DOCUMENT RESUME

ED 398 686 EC 304 978

AUTHOR	Thomson, Charlotte; And Others
TITLE	Individualised Educational Planning: A Guide for Meeting Learners' Needs.
INSTITUTION	Massey Univ. (New Zealand).
SPONS AGENCY	Ministry of Education, Wellington (New Zealand).
REPORT NO	ISBN-0-908665-57-1
PUB DATE	91
CONTRACT	TD90/5
NOTE	207p.
AVAILABLE FROM	Ministry of Education, P.O. Box 1666, Wellington, New Zealand ($35).
PUB TYPE	Guides - Non-Classroom Use (055) -- Reports - Descriptive (141)
EDRS PRICE	MF01/PC09 Plus Postage.
DESCRIPTORS	Administrative Policy; Communication Skills; Compliance (Legal); *Disabilities; Educational Cooperation; Educational Policy; Elementary Secondary Education; Foreign Countries; *Individualized Education Programs; Learning Modules; Problem Solving; Program Development; Program Evaluation; Program Implementation; Records (Forms); Special Needs Students; Student Educational Objectives; Student Evaluation
IDENTIFIERS	*New Zealand

ABSTRACT

This guide to Individualized Educational Plans (IEPs) for students with special needs in New Zealand begins with an overview section which discusses what an IEP is, policy and administrative requirements, and steps in the IEP process. Module 1 presents basic information about the IEP. Module 2 describes school organization to facilitate IEPs and recommends ways for schools to establish a special education committee. Module 3 examines the importance of assessment in the IEP process and gives a framework for action. Module 4 describes the framework and stages of the IEP meeting and makes organizational recommendations. Module 5 provides guidelines on establishing goals and objectives for the student. Module 6 explains the details and administrative requirements of the IEP and provides sample forms. Module 7 recommends ways in which adaptations can be made to meet the needs of individual students. Module 8 focuses on the art of negotiation and outlines a collaborative problem-solving model. Module 9 provides information on communication skills that facilitate communication with other IEP team members, including parents. A parents' guide on the IEP process is included. Appendices provide news releases, a task force report, and a Ministry of Education statement. (Contains 32 references.) (CR)

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A GUIDE FOR MEETING LEARNERS' NEEDS

ED 398 686

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This Guide was written under a Contract between the Ministry of Education and Massey University (Contract No. TD90/5). The Contract was to provide a teacher development programme in the use of the individual educational planning process under the mainstreaming system. The project was initiated by Charlotte Thomson. The Project was directed by Charlotte fron June 1990 to March 1991, and by James Chapman from April 1991. The delivery of the Teacher Development Programme was coordinated by Adrian Benson of the Central Special Education Service and James Chapman from Massey University. Special Education Service staff in the Central (West) region presented the Teacher Development workshops.

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First Published 1991
© 1991 Ministry of Education
ISBN 0-908665-57-1

Printed by
Massey University Printery
Massey University
Palmerston North
New Zealand

The Individual Education Plan

An Overview

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What is an IEP?

It is the means whereby we ensure that students who have special needs receive a programme that is designed to meet those needs.

It involves all those who are concerned with the welfare and education of the student coming together and working as a team to produce a written plan which outlines what the student needs to learn and how it will be taught.

IT IS A PROBLEM-SOLVING PROCESS

- *carried out by a team of people*
- *with an interest in the welfare of a student with special needs*
- *to ensure that the student receives a programme which meets his/her needs.*

A WRITTEN PLAN IS PRODUCED WHICH:

- *states clear objectives for the student*
- *is devised by the team working together*
- *lists the strategies for achieving those objectives*
- *outlines the resources needed*
- *states how progress will be measured*
- *gives a date for review of progress.*

How did the concept of IEPs develop?

IEPs have been a feature of New Zealand special education since about 1986.

The IEP concept has been "borrowed" from the United States, where it has been used since 1975.

The core idea of the IEP is that each child with special needs requires a programme that is tailored to help them meet their potential and that this should be devised by those people with a close interest in the care and education of the child.

This concept is consistent with the philosophy of the *New Zealand Draft Review of Special Education* Department of Education (1987). Special educators found the IEP a useful vehicle for ensuring systematic programming. The Ministry of Education in 1989 required the Special Education Service to ensure that every student with special needs has an IEP. It is now central to special education delivery in New Zealand.

The IEP process follows the basic teaching model of:

Assessment	• finding out where students are at
Setting goals and objectives	• stating where you would like them to be
Teaching	• devising and implementing strategies for getting them there
Evaluation	• checking whether you succeeded
Further planning	• trouble-shooting and setting new objectives

The new elements added to the process are:

- *involvement of parents*
- *collaboration/consultation/ teamwork*

What are the policy and administrative requirements of the IEP?

It is ministry policy that every student with special needs has an IEP.

The SES is contracted to ensure that this happens.

The following are the only criteria specified for IEPs.

The IEP must:

- be based on up-to-date assessment gathered in the normal environments of the learner as far as possible by those in day to day contact with the learner;
- be devised in consultation with those regularly involved with the care and education of the learner;
- contain specific objectives for the learner;
- detail teaching strategies and resource deployment to achieve these objectives;
- detail objective evaluation procedures.

All discretionary funding is now to be tied to the IEP. Unless there is an IEP a student will not be able to receive discretionary funding such as teacher aide time.

There are no "official" national guidelines (at time of going to press) for the IEP process.

Provided the above criteria are met, schools are free to work out their own organisational structures and procedures.

There is no "official" IEP form. Schools can devise their own. An IEP may be written for any student who has a need not catered for by the regular programme.

The important documents to consult in relation to the policy requirements of IEPs are:

> The Agreement between the Ministry of Education and the Special Education Service.
>
> The Report of the Perris Task Force.

What has the IEP to offer?

THE IEP PROCESS FACILITATES:

- *a systematic approach to programming for students with special needs.*
- *the opportunity for communication.*

  Communication links must be set up between the home and the school and between the school and the support services.

  The process provides a forum where those most concerned with the student can express their point of view and have it listened to.

  It enables everyone involved with the student to hear other viewpoints and perspectives on the student and his/her needs.

- *a problem-solving approach.*

  The team pool ideas, knowledge and skills to devise strategies to help the student meet the goals and objectives.

- *a support network.*

  The parent and the class teacher, in particular, no longer need feel that they have the sole responsibility for the student. All team members share in the responsibility and give support and assistance to each other.

- *an orderly allocation of resources.*

  The IEP process provides a systematic means of identifying the resources students require to meet their needs.

  It indicates to the servicing agencies, such as the Ministry of Education and the Special Education Service, the demand for resources and thus assists them in forward planning. It also provides a framework for the equitable allocation of existing resources.

- *involves the student in the setting of goals and objectives for learning.*
- *accountability.*

  The IEP document makes clear who is responsible for what.

  Regular reviews clearly show whether goals and objectives are being met and whether resources are being provided.

IEPs make good educational sense

What are the steps in the process?

- ORGANISE FOR THE IEP

  Get the structure in place. IEPs will not "just happen". They cannot be left to the classroom teacher.

  Organise a special needs committee; or appoint a coordinator.

  Get the lines of communication organised.

- CONSULT

  Wherever possible talk with the student. The student is at the centre of the process.

  Get to know the parents. Find out their views of the process. Gain their support and cooperation.

  Contact the Special Education Service. They will assist you with the planning.

  Get all the school staff on-side. Solicit their opinions and ideas.

- GATHER INFORMATION

  Organise for all the team members to gather relevant information.

- HOLD THE MEETING AND PRODUCE THE PLAN

  Be prepared for the meeting. Have all the necessary information collected and circulated to the team well in advance of the meeting date.

  Consult the parents as to time and venue and membership of the team.

  Attend to the "people aspects" of the meeting. Ensure everyone's comfort. Ensure everyone's views are heard and valued. Adopt a problem-solving approach.

  Share information. Evaluate relevance and meaning of information for devising the programme.

  Clarify where you want to go (the long term goals).

  Decide what you want the student to be able to do (the objectives).

  Work out the strategies for getting the student there.

  Decide who will do what.

Work out the resources that will be needed. If the resources cannot be found within the school organisation, take the necessary steps to seek discretionary resources.

Ensure consensus.

Decide how progress and success of the programme will be measured.

Set a review date.

Write the plan.

- IMPLEMENTATION OF THE PROGRAMME

  Go to it. The IEP written plan is a working document. It should be referred to constantly by those people responsible for assisting the student to meet the objectives.

  Keep good records of progress. This information becomes invaluable data for setting objectives at the next IEP meeting.

- EVALUATION OF THE PROGRAMME

  This can only happen if good records have been kept.

  If the objectives have been carefully set then evaluation will be fairly simple. It will involve checking that the stated criteria and conditions of the objectives have been met.

  If the objectives have not been met, then the team must troubleshoot and problem-solve; rethink either the objectives or the strategies. It is all useful information that can be used in a positive way to work out a better programme.

- DEVISE A NEW PROGRAMME

  The IEP process is a continuous one.

Organisation and consultation

If the IEP process is to be successful and run smoothly it must be planned for at the level of school administration.

Consider setting up a special needs committee in your school.

The Special Education Service will help you do this.

This committee should oversee all matters having to do with special education in the school.

It can be particularly helpful in organising the IEP process by:

- ensuring the necessary lines of communication are set up
- helping to decide whether an IEP is necessary
- organising the collection of information in the assessment stage of the process
- organising the meeting
- supporting the teacher in the implementation of the programme
- organising the necessary resources.

A committee will greatly facilitate the consultation process.

The committee can ensure that the parents and all involved support and teaching personnel are consulted in a coordinated way.

Assessment

Once parents, student, staff and support personnel have been consulted and the organisational structures are in place the next step in the process is **assessment.**

Assessment is the gathering of the relevant information to enable the IEP team to devise an effective programme for the student.

Assessment helps the team to:

- establish what the needs of the student are
- work out ways of meeting those needs.

To establish needs it is necessary to:

- gather information on the characteristics of the student
- gather information on the nature of the environment - everything that is happening around the student both at home and at school which affects teaching and learning in both academic and social areas. It includes the curriculum, teaching style, materials, social expectations.
- examine the interaction between the two.

This approach is known as **Ecological Assessment.**

Assessment for IEPs must be ecologically based. One cannot develop effective teaching programmes by looking at the characteristics of the student in isolation.

One cannot establish the nature of a need without looking at what the environment is demanding of the student.

The **key people** in the assessment process are the **parents** and the **teacher.** They are the people in day-to-day contact with the student.

IEPs are about teamwork, and sharing responsibility. Parents and teachers can therefore look to other members of the team for help and support in assessment.

HOW DO YOU GO ABOUT ASSESSMENT?

STEP 1

Ask - What do I need to know?

- How do I find out?

STEP 2

List specific questions that emerge from Step 1.

STEP 3

Identify your sources of information

STEP 4

Gather the data

ASSESSMENT QUESTIONS

These questions will be different for different students but you will need information about:

- The student's background
- What motivates the student and how he/she learns
- Social behaviour
- The curriculum
- Teaching style and classroom organisation

SOURCES OF INFORMATION

What do you do to find the answers to these questions?

There are many sources of information available to the teacher. It is unlikely that all these sources would be utilised in any one assessment. The assessment procedure varies from student to student.

- Records and reports

- Consultations with key people
  - the student
  - the parents
  - the student's previous teacher
  - support people such as psychologists

- Observations
  - anecdotal running records
  - event recording
  - duration recording
  - time sampling

- Tests
  - class/syndicate/common tests
  - criterion-referenced tests
  - norm-referenced tests

- Task analysis

- Analysis of student work samples

- Diagnostic teaching

ORGANISATION OF THE DATA

Once the information has been gathered it is important to organise it in such a way that it can be communicated quickly and easily to the rest of the IEP team.

How the teacher goes about doing this is a matter of personal preference.

One format which many teachers have found to be useful is a Strengths/Needs/Strategies document.

In this document the teacher lists, on the basis of the assessment information, what the student is able to do in the important areas for development and what the student should be able to do next.

Based on the assessment information, the teacher lists the teaching strategies or interventions that s/he considers might be successful.

The meeting

Once the necessary information has been collected and circulated to the members of the team the IEP meeting is held.

There are no set rules, only advice or guidelines as to:

- who should attend
- how many people should be there
- where the meeting should be held
- how often it should be held.

Schools and parents can decide these things for themselves.

However, as a general rule only those with a close interest in the student and an ability to contribute should attend the meeting.

The parents and the teacher are essential members of the team.

When deciding the venue it is important that parents will feel comfortable and at ease.

It is a good idea to appoint a coordinator who can:

- provide a focal point for communication for all team members
- chair the meeting
- facilitate group processes to help develop good teamwork.

It is important that attention is paid to building up a good team feeling in the group. This will not happen quickly - it takes time.

A good team spirit is likely to develop if:

- attention is paid to ensuring good communication
- everyone is treated with respect and their contribution valued equally
- a problem-solving approach is adopted
- disagreement and differences of opinion are brought out into the open and handled constructively.

A number of tasks must be completed during an IEP meeting. These follow a logical sequence.

STAGES OF THE MEETING

- introductions and agenda setting
- review of strengths and needs (sharing of information)
- development of goals and objectives
- development of teaching strategies
- decisions on resources committed and required
- assignments of tasks
- writing the plan
- conclusion of the meeting

INTRODUCTIONS AND AGENDA SETTING

This is an important part of the meeting as the "tone" is set. Take time to ensure that everyone knows everyone else and that there is an agreed agenda.

REVIEW OF STRENGTHS AND NEEDS

This is the part of the meeting where everyone shares the assessment information they have about the student and discusses the relevance and importance of that information to the teacher programme.

DEVELOPMENT OF GOALS AND OBJECTIVES

Goals are guides.

- They indicate in a general, global way what you would like to see happen for the student.
- They reflect values, hopes and expectations.

Take time to set the goals. At the very beginning of the IEP process it may be a good idea to have a meeting just to clarify the goals.

If goals are not clear and agreed upon, miscommunication and misunderstanding may occur later.

Objectives are shorter steps on the way to the goal.

Objectives describe what a student will be able to **do.**

Objectives do not describe what the teacher will do. That is a teaching strategy. Teaching strategies and objectives often are confused.

There are four components to an objective:

- the student's name
- what the student is expected to be able to do
- under what conditions
- to what standard.

For example: Judy will be able to use capital letters and full stops. In all her written work she will make no more than 2 errors out of 10.

CHECK:

Do the objectives clearly reflect what you are trying to achieve for the student?

- Will it help the student achieve a goal?
- Do the parents agree?
- Is the skill functional?
- Is the objective meaningful to the student?
- Does it assist the normalisation process?
- Does it fit with other skills the student is learning?
- Does it fit into the class programme?
- Is it age appropriate?
- Is there a high chance of success?
- Is it based on the assessment data?

Setting goals and objectives, like any other skill takes time to master. It is worth persevering.

If you do not know where you are going you may never get there and even if you do, you may not know it!!

If goals and objectives are carefully worked out, evaluation follows easily. One only has to check whether the objectives have been reached to judge whether the programme was successful.

DEVELOPMENT OF TEACHING STRATEGIES

The teaching strategies need not be worked out in detail but a general indication should be given as to what might be successful.

Working out the details of the teaching programme is the professional responsibility of the teacher. However, the notion of teamwork and shared responsibility means that the team as a whole can make creative and useful suggestions which the teacher may wish to follow.

The strategies that may be used are varied and many. They are limited only by the creativity of the team.

If an ecological approach is taken then strategies to alter the environment rather than "fixing" the student will increase the possible range.

Teachers first of all should consider how they might alter teaching styles, structures, classroom environment and materials.

DECISIONS ON RESOURCES

The IEP team should first consider strategies and programmes that can be resourced from within the school's existing resources.

It is helpful if a senior member of the staff is part of the team as they can advise and help facilitate any reorganisation of resources.

If the needs of the student cannot be made from these resources then the resources needed should be clearly outlined. If the team requests discretionary resources, they should be quite specific about what resources are necessary, how they will be used and what outcomes are expected.

ASSIGNMENT OF TASKS

Everyone should be quite sure what is expected of them.

They should agree publicly that they are willing to undertake the task.

No tasks should be allocated to anyone in their absence.

WRITING THE PLAN

The outcome of the meeting is the production of the **written plan.** This document is a summary of all the decisions that have been made at the meeting.

There is no official format for an IEP. However the administrative requirements (as outlined in the agreement between the SES and the Ministry of Education) are that the plan should contain:

- specific objectives for the student
- teaching strategies
- responsibilities
- resources needed
- evaluation procedures.

How the plan is written is a matter for local decision making.

Gather together a variety of formats. See how other people have approached the task and develop your own method.

Experience has shown that it is very useful to include the following:

- names of the people in the team
- long term goals
- present levels of attainment in the priority areas
- objectives
- evaluation criteria
- teaching strategies
- resources
- responsibilities
- mainstreaming - if not, why not?
- general comments

REMEMBER:

The written plan is a working document. It forms a guide for instruction.

It should therefore be:

- clear
- unambiguous
- easy to follow.

CONCLUSION OF THE MEETING

All major decisions should be reviewed and agreed to.

The IEP document should be signed and distributed either at the meeting, if possible, or later.

A tentative date and venue should be set for the next meeting.

After the meeting

IMPLEMENTING THE PROGRAMME AND EVALUATION

The IEP document is worthless if it is not used as the basis of an effective teaching programme.

Research shows that this does not always happen.

It is essential that all those who have undertaken a task fulfil their commitment.

If the objectives are successfully reached this information is taken back to the next meeting, another objective towards the goal is set and the process continues.

If the objectives are not reached, the records should be taken back to the next meeting and a process of trouble-shooting and problem-solving gone through. New objectives should be set and the process continues again.

The setting of careful objectives greatly facilitates the evaluation process.

Evaluation in the IEP process is formative. That means that the evaluation information is used to alter and improve the programme - not to judge success or failure.

Information gained in programming is used in evaluation and becomes important assessment information in the next IEP cycle.

There is no beginning and end to the IEP process. It is continuous and on-going.

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INTRODUCTION

Mainstreaming

Mainstreaming has been a major issue in education in New Zealand in the past ten years. The debate over mainstreaming has dealt with human rights issues, legal issues, service delivery, funding, educational practices and some academics have even brought in morals and ethics. Encompassing as it does all these areas it is unlikely to be a simple issue.

While the debate has been going on much work has been done by educators, advocates and officials of the former Department of Education and the present Ministry of Education to facilitate special educational need. After several years of work all children finally won the right to an education at the school of their parents' choice in 1987 with the Education Amendment Act. This was carried through in the Tomorrow's Schools legislation (Education Amendment Act, 1989).

At the same time educators were working hard at the progressive inclusion of more and more students into the mainstream. That they have succeeded is evidenced by the closure of many special schools and the reorganisation of the majority of special classes as a more flexible resource.

There are therefore large numbers of students mainstreamed who would previously have been in special schools or special classes. They have a right under the law to be in their neighbourhood school.

This resource does not debate the mainstreaming issues. It takes mainstreaming as a given in our schools today. It sets out to give schools, teachers and parents information about a process which can facilitate the delivery of service to students with special needs. The process is designed to help ensure that those needs are being met through the **Individual Educational Plan** or **IEP.**

An educational tool

The Special Education Service is contracted to the Ministry of Education to ensure that every student who has special needs has an IEP. It is therefore an administrative requirement.

Planning to meet the needs of students who have special needs in a systematic, constructive and consultative manner makes good educational sense. These modules have been developed for use as an educational tool to assist planning for effective teaching. They have much wider application than to those students designated as having "special needs". A number of students may benefit from individual goals and objectives being set for them.

Flexibility to meet school and community needs

There are only a few requirements laid down at a national level for the development of IEPs. This is appropriate in the devolved structures of Tomorrow's Schools. Schools and their communities have a great deal of flexibility in how they organise the IEP process. Who should have an IEP, how it is arranged, who should be on the team, where the meeting should be held, who should chair the meeting, what the format of the written document should be and many other details can be decided by the school, the parents and the support services working together to achieve what is appropriate in that particular school and community.

Individual need not be individualised tuition

It should be noted that "individual" does not refer to one-to-one teaching. The IEP is not a plan for **individualised tuition**. It is planning to meet the **individual needs** of the student. The whole notion of mainstreaming is that these needs should be met in as normalising or typical a way as possible. This means that the students should be involved with other students in the class, not sitting alone doing their own separate programme.

Individual Development Plan

In early childhood settings and early intervention programmes the IEP is referred to as the **IDP** or **Individual Development Plan**. The underlying principles are the same. However, this resource concentrates on the IEP and is designed for use in primary, intermediate and secondary schools.

Abbreviations

Throughout the resource *Individual Educational Plan* is abbreviated to IEP and *Special Education Service* is abbreviated to SES.

How to use this guide

BACKGROUND

This resource was produced cooperatively by Massey University and the Central District Branch of the Special Education Service (SES) under contract to the Ministry of Education.

It is part of a teacher development programme on individual education plans (IEPs) funded by the Ministry of Education.

The major features of this programme include:

- two days of inservice training for teachers, senior teachers and parents brought together in neighbourhood clusters of schools
- on-going back-up and support from the SES
- the learning resource package

While the resource was designed as part of the teacher development programme it has also been designed for use as a source of information and on-going staff and parent development.

Schools may wish to use the modules for staff development sessions, either using their own resources or seeking the support of the SES or other support agencies.

RATIONALE

Schools, individual teachers and parents often have different levels of knowledge and skill regarding Individual Educational Plans (IEPs). While some aspects of IEPs are new, many of the skills of good teaching are relevant to its success - teachers and parents already have many of the necessary skills. A resource, therefore, had to be designed in such a way that people could take out of it what was useful to them and build on the skills and knowledge they already had.

The modules follow a logical sequence in the development and implementation of the IEP. The modules are designed to follow the steps of the IEP process. The skills discussed in Modules 8 and 9 *(Negotiation* and *Communication)* are skills which can be usefully employed throughout the IEP process.

Each module is, however, also "free-standing" and may be taken as a topic for staff development or individual professional development for teachers. For example, staff may feel competent and skilled in the areas of assessment and goal setting but have some uncertainties about the requirements of the written plan. The written plan module could therefore be used on its own for a staff development session.

Although the material is written with IEPs as the focus, much of it will be relevant to other areas of teaching.

CONTENTS AND ORGANISATION

The resource consists of 9 modules, an overview, and an information guide.

Overview

As the title suggests this is an overview of the whole IEP process, summarised from the modules.

Module 1: The Individual Education Plan

Gives basic information about the IEP, explains what it is and outlines the process and essential elements.

Module 2: School Organisation

Discusses school organisation to facilitate IEPs and suggests ways in which a school might set up a special education committee.

Module 3: Assessment

Discusses the importance of assessment in the IEP process and supplies a framework for action.

Module 4: The IEP Meeting

Outlines the framework and stages of the meeting and gives suggestions on how to organise and chair the meeting.

Module 5: Goals and Objectives

Defines goals and objectives and discusses how to set them.

Module 6: The Written Plan

Outlines the important details and administrative requirements of the written plan and provides some sample forms that others have found useful.

Module 7: Programme Adaptations

Outlines ways in which adaptations can be made to the programme to meet the needs of students who have special needs.

Module 8: Negotiation

Proposes principled negotiation and discusses different models of decision-making. It also outlines a collaborative problem solving model.

Module 9: Communication

Briefly outlines some communication skills to facilitate good communication and relationships among IEP team members. It also gives suggestions to teachers about communicating with parents.

A Guide for Parents

This is written for parents who are involved in the IEP process to inform them how they can be involved in the education decision-making concerning their child.

SUGGESTIONS ON USE OF THE RESOURCE

For teachers

It is suggested that the *Overview* module is read first. This summarises much of the material in the modules. Reading this first should assist teachers to decide which areas they would like to explore and develop further.

Teachers can then choose the modules they need to work on. They may wish to do this with a group of colleagues, or the whole staff may decide to work together on particular modules.

Some schools may choose to work through the modules as they progress through the IEP process.

Schools may wish to use the range of expertise within the school or seek support and assistance from the SES or other support agencies.

For parents

Parents participated in the in-service programme funded by the Ministry. As parents are to be full, participating members in the IEP process, as they should be, it is a good idea to involve them as much as possible in any skills development and training. Involving parents from the beginning helps to build up teamwork and learning together, which is essential for the successful implementation of the IEP process.

A Guide for Parents is designed so that it can be easily photocopied and given to any parent who is to be involved in the IEP process.

Parents may wish to read the *Overview* and some of the modules after they have read *A Guide for Parents* and as they begin to be involved in the IEP process.

TEAMWORK

One of the principal underlying notions of the IEP is that of teamwork. Teamwork is greatly facilitated if people gain new knowledge and develop new skills **together**, supporting each other as they go. It is hoped that the material in this resource will be used by schools in a team-building way.

The Individual Education Plan

MODULE 1

Massey University

THE IEP OR INDIVIDUAL EDUCATIONAL PLAN

This Module

- Gives basic information about the IEP
- Explains what it is and outlines the essential elements
- Explains the process of IEP development
- Discusses how IEPs were developed
- Shows how IEPs have become part of special education in New Zealand
- Explains the major administrative documents
- Discusses teamwork

Also outlines

- How members of the team will contribute
- The advantages of IEPs

What is an Individual Educational Plan?

The IEP is a plan for ensuring that each learner with special needs is provided with an appropriate programme

An IEP is developed when the people who are concerned with the education and welfare of a learner with special needs get together to plan, implement and monitor a special programme for the learner.

THE IEP

- *is a written plan*
- *is devised by a team*
- *states clear objectives for the learner*
- *lists the strategies for achieving them*
- *outlines the resources needed*
- *states how progress will be measured*

Essential elements of an IEP

TEAMWORK

Teamwork is a critical and essential feature of the IEP. It must be planned by a team of people who are closely concerned with the education and welfare of the student. The parents and the teacher are key people in the process.

SHARED INFORMATION

The IEP must be based on up-to-date information gathered by those in close contact with the learner. The information must be shared and form the basis of the educational decisions which will be made.

SHARED DECISION MAKING

Parents and professionals work as partners in the preparation of the IEP. They decide together what the student's needs are and how those can best be met.

ACCOUNTABILITY

Objective evaluation procedures should be outlined in the plan. The IEP must be monitored and reviewed on a regular basis.

A WRITTEN PLAN

There must be a written record of the planning.

Process and product

The IEP is not only a document but also a PROCESS, a set of activities aimed at ensuring appropriate planning for the student.

The PROCESS consists of:

- *gathering information*
- *consulting all those involved*
- *holding a meeting*
- *devising and writing the plan*
- *putting the plan into action*
- *evaluating how successful it has been*
- *on-going revision and planning*

The PURPOSE of the process is to

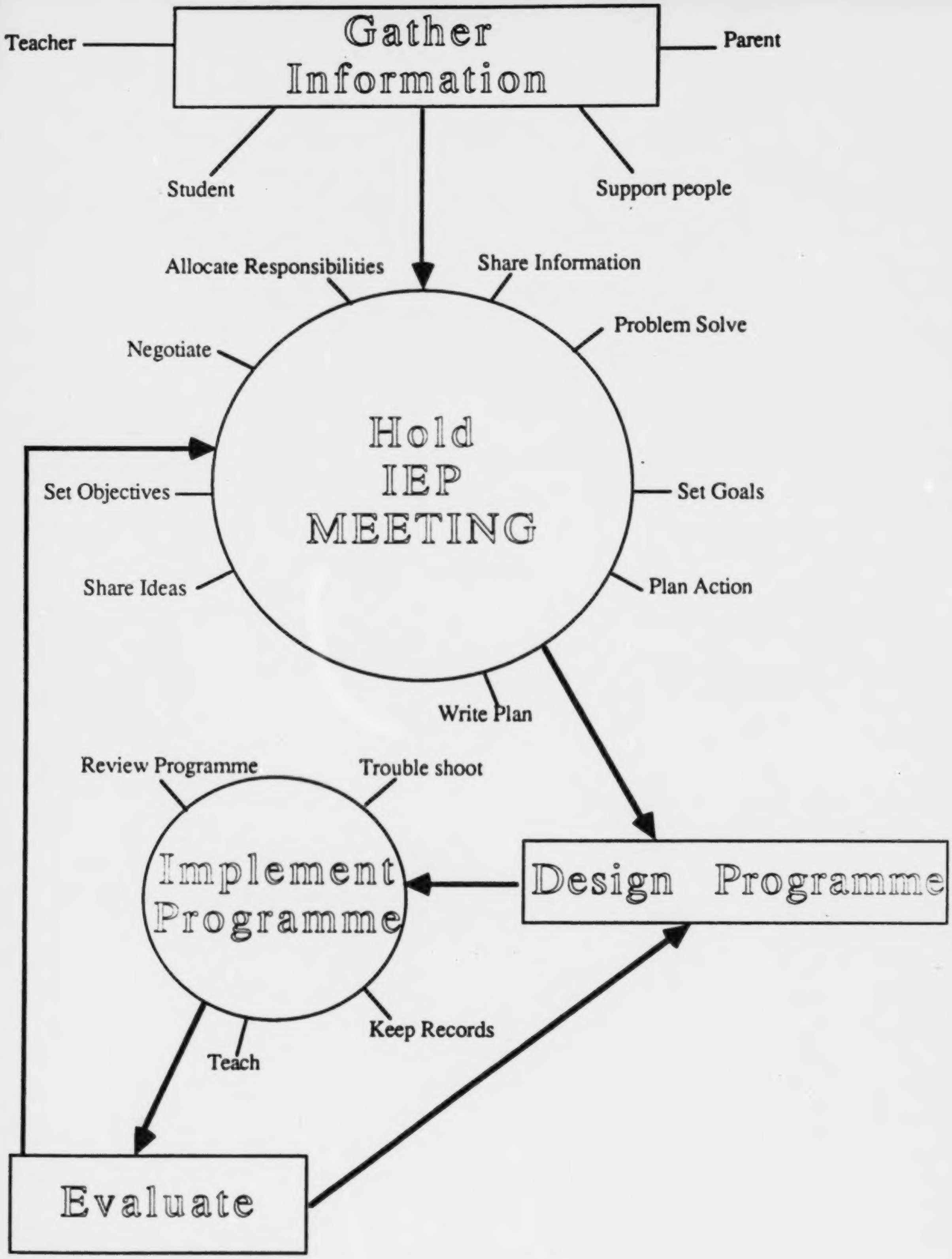
- develop
- review
- revise

an educational plan for the student.

Once the original plan is developed the review and revision is a continuous process.

The PRODUCT is the written plan which:

- *outlines what is to be achieved*
- *outlines what actions are to be taken*
- *serves as a measure of achievement*


Gather Information
Teacher
Parent
Student
Support people
Allocate Responsibilities
Share Information
Problem Solve
Negotiate
Hold IEP MEETING
Set Objectives
Set Goals
Share Ideas
Plan Action
Write Plan
Review Programme
Trouble shoot
Implement Programme
Design Programme
Keep Records
Teach
Evaluate

Adapted from Rees (1986).

Background to the IEP

IEPs have been a feature of the delivery of special education in New Zealand since 1986

Many special educators, parents and teachers have found them to be a useful means of ensuring effective programming.

The following sources have all had an influence on how IEPs have been developed and adopted in New Zealand:

- Public Law 94-142 in USA (1975)
- The *New Zealand Draft Review of Special Education* (1987)
- The Agreement between the New Zealand Ministry of Education and the Special Education Service (1989)
- The Perris Task Force Report (1990)

AMERICAN LEGISLATION: Public Law 94-142 (1975)

The IEP is a concept "borrowed" from the United States. It is a major feature of Public Law 94-142, the benchmark of American legislation which ensures the rights of all children, with a disability, to an appropriate education. This law has had an influence on special education practices in many countries.

The IEP is the "management tool" of the that law; in other words it is the means by which the aims and intentions of the Act are put into practice.

There are three fundamental tenets for the IEP:

- *each child requires an educational plan that is tailored to achieve his or her maximum potential,*
- *all principals in the child's educational environment, including the child, should have the opportunity for input,*
- *individualisation means that specific details must be given about goals, objectives and review.*

The American legislation outlines the requirements for IEPs in some detail, such as how and when the parents will be informed and involved; who must participate at the meeting; time lines to be observed; frequency of review.

In the United States, the IEP is a legal requirement. Without an IEP no special education services can be delivered.

Parents have rights under the law and can have legal redress if the process is not followed as mandated.

THE *DRAFT REVIEW OF SPECIAL EDUCATION*

The concept of the IEP is very much in keeping with the principles of the NZ *Draft Review of Special Education* (Department of Education 1987). Written after widespread consultation, this document outlined the future directions for special education. It had as its two fundamental principles, that:

> *resources should be delivered on the basis of the needs of the learner;*
>
> *all those most closely concerned with the child should be part of the decision making.*

THE AGREEMENT BETWEEN THE MINISTRY OF EDUCATION AND THE SPECIAL EDUCATION SERVICE

This is an important document for all those involved in special education. It outlines what the Ministry has contracted the Special Education Service to do.

This document states that:

> *The individual education plan process will be central to service delivery*

Under this agreement, the SES must:

> *ENSURE THAT FOR EACH LEARNER on the roll of an attached unit or teacher or for whom an extra resource or programme change is required, A WRITTEN PROGRAMME PLAN IS DEVELOPED.* (Emphases added)

This document goes on to list the CRITERIA FOR AN INDIVIDUAL EDUCATION PLAN. It must be:

- *based on up to date assessment data gathered in the normal environments of the learner as far as possible by those in day-to-day contact with the learner;*
- *devised in consultation with those regularly involved with the care and education of the learner;*
- *contain specific objectives for the learner;*
- *detail teaching strategies and resource deployment to achieve these objectives;*
- *detail objective evaluation procedures.*

These appear to be the only national criteria for the IEP.

THE PERRIS TASK FORCE REPORT

This Task Force was established by the Ministry of Education. It met regularly between March and May 1990 and received over 250 submissions from advocacy groups, schools and parents.

This Task Force defines an IEP as:

> *an educational plan designed to meet the specific current needs of a learner with special educational needs. It brings the learner, teacher, parents and others closely involved, together in a team to develop a meaningful plan for the identified learner for a specified time period, in a particular setting.*

The Task Force proposes that:

> *a system be developed in which special education provisions are targetted towards an individual education plan which are seen as a 'top-up' over standard education provision for the learners in that type of school ...... The operational grant would be supplemented by additional special education resources, targetted to supporting the IEPs of particular learners on the school roll.*

IN SUMMARY THEN THE DOCUMENTS TELL US

Public Law 94.142

- sets out the general model for the U.S. which we have chosen to follow in New Zealand

The NZ *Draft Review of Special Education*

- sets out the philosophy and basic principles for the use of IEPs

The Agreement Between the Ministry of Education and the Special Education Service

- establishes the IEP process as central to service delivery
- sets out the criteria for IEPs

The Perris Task Force Report

- confirms the importance of the IEP process for the delivery of special education services

- it also links funding to the IEP

What does all this mean?

- As in the United States the IEP has become the "management tool" for the delivery of special education services.
- Unlike the United States IEPs do not have the status of legal documents. They are, however, required by the Ministry of Education's policy.
- All discretionary funding is now to be tied to the IEP, that is, unless there is an IEP a student will not be able to receive discretionary funding such as teacher aide time.
- The Special Education Service must ensure that every student who requires extra resources or changes to the programme has an IEP.
- Those most closely concerned with the student, in most cases the parents and the teacher, must play a key role in the development of the IEP. They must be consulted and involved in every stage of the process.
- The IEP must be specific about what it is the student is to achieve, how it is going to be achieved, what resources will be needed and how it will be evaluated.
- Apart from what is outlined in the agreement document and the Perris Task Force Report there, are as yet, no national guidelines for the IEP process.
- Parents, principals, teachers and other professionals have an opportunity to devise systems, strategies and processes for the IEP which meet their own particular circumstances and needs.

Teamwork

Teamwork is an essential element in the IEP process.

An IEP is a team effort.

Who should be on the team?

The simple answer is: anyone who has a contribution to make to the learner's programme.

This will vary according to the learner's needs - the more complex the needs the larger the team is likely to be.

As a general rule, as far as teams are concerned:

SMALL IS BEAUTIFUL

However, there are a number of key people who should be present:

- parents
- the teacher
- anyone who will be expected to carry out any of the strategies decided at the meeting

It is important to have the key people in the student's life as part of the team. One of the criteria agreed on by the Ministry of Education and the Special Education Service is that the programme should be based on data gathered by those in close contact with the student. As a general rule, that means the parents or caregiver and the teacher. These are the people who usually have the greatest responsibility in carrying out any programme.

If the student is on the roll of a special education teacher then that teacher should also attend.

Anyone who has information to contribute which will assist programming or who will be expected to carry out programming should be present.

It is also helpful to have a senior teacher or the principal involved. Programme modifications frequently involve changes in school organisation and support for the classroom teacher.

A team can consist of the parent, the teacher and a senior teacher or the principal if the programme modifications required for that student are likely to be straightforward.

If, on the other hand, the student has a severe disability or has multiple disabilities the team may need to be a large one to ensure cooperation and coordination of all those involved. It might consist

of the parent, the teacher, the special education teacher, a member of the Special Education Service, a physiotherapist and/or an occupational therapist. With such a large team of professionals the parent may wish to bring along a supporter or an advocate.

Whoever convenes the meeting should consider the composition of the team carefully. They should ensure that parents are consulted on who should be present and that the final list has their approval. They will also ensure that all members can and do contribute something of value to the process.

The details of meetings are outlined in Module 4: The IEP Meeting.

Contribution and role of team members

PARENTS

- provide a direction for the child's future
- present family values and priorities for the child
- provide a wider perspective on the child
- provide insights into the child's functioning in a variety of environments
- assist with programming

REGULAR EDUCATION TEACHER

- provides information and insights about the student's functioning in the mainstream environment
- adapts learning activities in the classroom to enable the student to meet the IEP objectives
- includes the student as a full member of the class

SPECIAL EDUCATION TEACHER

- provides information and insights about the student's functioning
- provides support to the classroom teacher
- provides expertise in adapting and modifying the curriculum
- gives individual instruction if required

PRINCIPAL

- provides information about school organisational issues
- assists in problem solving logistical issues
- seeks necessary resources

SPEECH/LANGUAGE THERAPIST

- provides information about the learner's language skills
- gives programme advice to teachers and parents
- gives individual therapy when required

PSYCHOLOGIST

- provides advice and guidance on the student's intellectual and social development
- gives insights into the student's motivation and behaviour across a wide range of environments
- assists with programme development, adaptation and evaluation.

PHYSIO AND OCCUPATIONAL THERAPISTS

- provide information on the learner's gross and fine motor functioning
- give advice on adapting materials and equipment
- give individual therapy when required

ADVISERS ON DEAF CHILDREN

- provide information on the student's level of hearing and consequent implications for educational and social development
- advise and assist with programme management
- ensure appropriate equipment is available

THE SPECIAL EDUCATION SERVICE

- ensures that the learner has an IEP
- advocates for resources for the student
- gives advice and support to regular and special education teachers and parents
- advocates for the best interests of the learner
- offers skill training

How can the IEP help you?

The IEP process brings many advantages to all those involved.

FOR THE STUDENT

- ensures a programme designed to meet specific needs.
- allows opportunity for involvement in the planning of the programme.
- makes the goals and objectives clear.

FOR THE TEACHER

- defines role and responsibilities clearly
- provides an opportunity to gain feedback
- provides a forum to request assistance, resources, support and services
- provides documentation of services and resources required
- provides assistance in solving problems
- provides support in meeting challenges
- enables the provision of input and information from other significant people in the learner's life
- may indicate areas where further professional development is required.

FOR THE PARENTS

- provides an opportunity to be involved in selection of goals and establish priorities for their child
- provides an opportunity for parents to state what they are willing to undertake and be responsible for
- provides a forum for requesting assistance, resources, support and services
- provides an opportunity to share information and work with the professionals closely involved with their child
- provides documentation of services and resources required
- clarifies responsibilities with regard to provision of services and resources
- enables them to monitor their child's progress and the delivery of committed services and resources.

FOR THE AGENCIES INVOLVED (SES AND MINISTRY)

- provides a systematic means for identifying individual needs of the learner
- provides a means of evaluating services in objective terms
- provides a data base for planning
- assists in identifying personnel training needs
- provides a mechanism for the orderly and equitable allocation of resources.

FOR EVERYONE INVOLVED

- enhances communication
- provides a forum for problem solving
- encourages good educational practice
- ensures availability of a broader base of expertise for programme planning
- provides a monitoring device for services and resources
- provides programme evaluation

School Organisation

MODULE 2

Massey University

SCHOOL ORGANISATION

This Module

- Discusses school organisation
- Suggests special needs committees

Also

- Outlines committee composition
- Discusses the details and functions of the Committee
- Identifies the organisational issues

Gives you

- A sample committee structure
- An organisational outline chart

Organising for IEPS

If the IEP process is to be successful and run smoothly it must be planned for at the level of school administration

The IEP cannot be left as a major responsibility of classroom teachers. While they might be the key figures in the process they require the backup of a school organisation and support system.

There are no national guidelines on how the IEP process must be set in place. This allows for flexibility in order to ensure that the particular needs of the school and its community are met.

It is important for a school and its community to get together with members of the Special Education Service to consider the issues and devise organisational structures for the implementation of the IEP process in the school. The IEP process must be in keeping with the needs of the school and its community.

Each school will want to establish its own organisation. What is important is that there is an umbrella of policy and procedures under which teachers can work to implement individualised programmes. These procedures should always be consistent with the school's philosophy. They should reduce the work involved to a minimum yet allow the maximum use of resources and teaching strengths available in the school.

This challenge can be met by establishing a

SPECIAL NEEDS COMMITTEE

or

SPECIAL EDUCATION COMMITTEE

within the school.

The special needs committee

There is at present no "official" definition of a special needs committee. The composition and methods of operating vary depending on the needs and the organisation in the school.

WHAT THE AGREEMENT SAYS

The Special Education Service must under their agreement with the Ministry of Education (1989) "promote the concept of special needs committees in learning institutions, and foster their continuing development".

Schools should therefore look to this service for advice and support when setting up these committees.

COMPOSITION OF COMMITTEE

These committees mostly consist of:

- a senior member of staff. This is important as the committee must sometimes make decisions which require the "authority" of a senior staff member. The senior member of staff must have a liaison line to the principal to ensure that all decisions will be consistent with the school's overall policy and practices;
- the special education teacher (e.g., support teacher or itinerant resource teacher) or a teacher with responsibility for special education in the school;
- a member of the Special Education Service;
- a member of the Board of Trustees or other parent representative;
- a representative of the staff.

In a secondary school the guidance counsellor and a representative of the deans are likely to be involved too.

FUNCTIONS OF THE COMMITTEE

In general the function of the committee is to oversee all matters having to do with special education in the school.

The committee may:

- implement the school's policy and charter statements on students with special teaching needs or, where the policy is not specific, determine how the policy will apply to these students;
- oversee the implementation of that policy in practice;
- ensure the school community has an understanding of what is being done to meet special needs;
- act as a focus for discussion and further development of policy and procedures;
- advise on, and approve if necessary, adapted programmes for students with special needs;
- support and encourage teachers, individually or in teams to meet the challenges of students with special needs;
- describe and monitor procedures;
- identify key people for liaison with outside agencies;
- oversee the orderly acquisition and allocation of resources;
- from time to time, identify key people to assist a student or teams of people to carry out programmes.

The above list is indicative only of the types of tasks that can be undertaken by these committees. It is by no means exhaustive.

The special needs committee and the IEP process

The IEP process of consultation, information gathering and team problem solving and programme planning raises a number of organisational issues for the school.

Once established the committee can ensure the smooth running of the IEP process in the school by examining and dealing with these issues.

The following are some of the organisation issues encountered and questions raised at each stage of the process.

1. CONSULTATION

This stage of the process requires that there are good lines of communication set up

- *between staff*
- *between home and school*
- *between school and the support services.*

These questions must be answered:

- *how will communication between staff take place?*
- *how will the school communicate with the parents?*
- *how will communication with support services be set up?*
- *who will be responsible?*

2. INFORMATION GATHERING

In this stage of the process information must be gathered about the strengths and needs of the student, the strengths and needs of the school and the resources available to the school.

These questions must be answered:

- *What information will be needed?*
- *Who will be responsible for gathering it?*
- *What support will that person need?*
- *How will the student be involved?*
- *How will the parents be involved?*
- *How will the support services be involved?*

3. THE MEETING AND PRODUCTION OF THE PLAN

During this stage the team must be set up, the information disseminated to all members, the meeting organised and chaired, the IEP plan developed and circulated.

These questions must be answered:

- *Who will be part of the team?*
- *Who decides?*
- *Who will be responsible for organising the meeting?*
- *Who will chair the meeting?*

4. IMPLEMENTATION OF PROGRAMME

During this stage the resources must be organised, support structures set in place to support the teacher, and progress monitored.

These questions must be answered:

- *How will the resources be organised?*
- *Who will be responsible?*
- *How will the programme be organised?*
- *How will the teacher be supported?*
- *How will the programme be monitored?*

5. EVALUATION

During this stage the review meeting must be organised, information about the attainment or otherwise of objectives gathered and disseminated. This poses similar questions to those relating to the gathering of information and holding the meeting in stages 2 and 3.

Having examined the IEP process and its demands, the following questions must be considered:

- *How can the organisation facilitate the process?*
- *How can the existing structures be adapted to incorporate this process?*
- *What new organisational structures are necessary?*
- *How can time be used efficiently and effectively?*
- *What additional skills do the staff need to implement this process and how will they be able to develop these skills?*

The answers to these questions and how the issues are dealt with will vary from school to school, depending on the management and communication structures. Here is an example of a committee structure which might help you set up your own committee. Tui Grove is a hypothetical school.

TUI GROVE SCHOOL

Provision for Students who have Special Needs

GOAL

To set up an in-school special needs committee under the leadership of an appointed coordinator to be responsible for all areas of special needs in the school.

MISSION STATEMENT

To meet the needs of all children in the school who have special needs by ensuring that organisational structures are in place which will enable early identification of needs, appropriate programming and support for staff in implementing the programmes and developing staff skills to meet the special needs of students.

GUIDING PHILOSOPHY

The charter statements committing the school to equity for all students.

KEY TASKS FOR THE COMMITTEE

- raise teacher consciousness/awareness of children with special needs
- establish criteria for the identification of special needs
- arrange for the identification of children who have special needs
- guide the development, implementation, monitoring and evaluation of programmes
- establish in-school programmes
- provide guidance, support, information and opportunities for teacher development
- liaise with support agencies through agreed channels and representatives

- advise the principal and members of the board of trustees on special needs policy in the school
- ensure the orderly distribution of in-school resources and the attainment and distribution of any discretionary resources required
- ensure good communication networks within the school and between home and school concerning students with special needs

MEMBERSHIP OF COMMITTEE

The deputy principal

A member of the staff elected by his/her peers

The itinerant resource teacher

A member of the Special Education Service

A member of the Board of Trustees

Coordinator. This will be a senior staff member with responsibility for special education in the school.

OPERATIONAL PROCEDURES

The special needs committee will be established at the beginning of the school year.

The principal will appoint the coordinator, in consultation with the committee.

The committee will meet once a month.

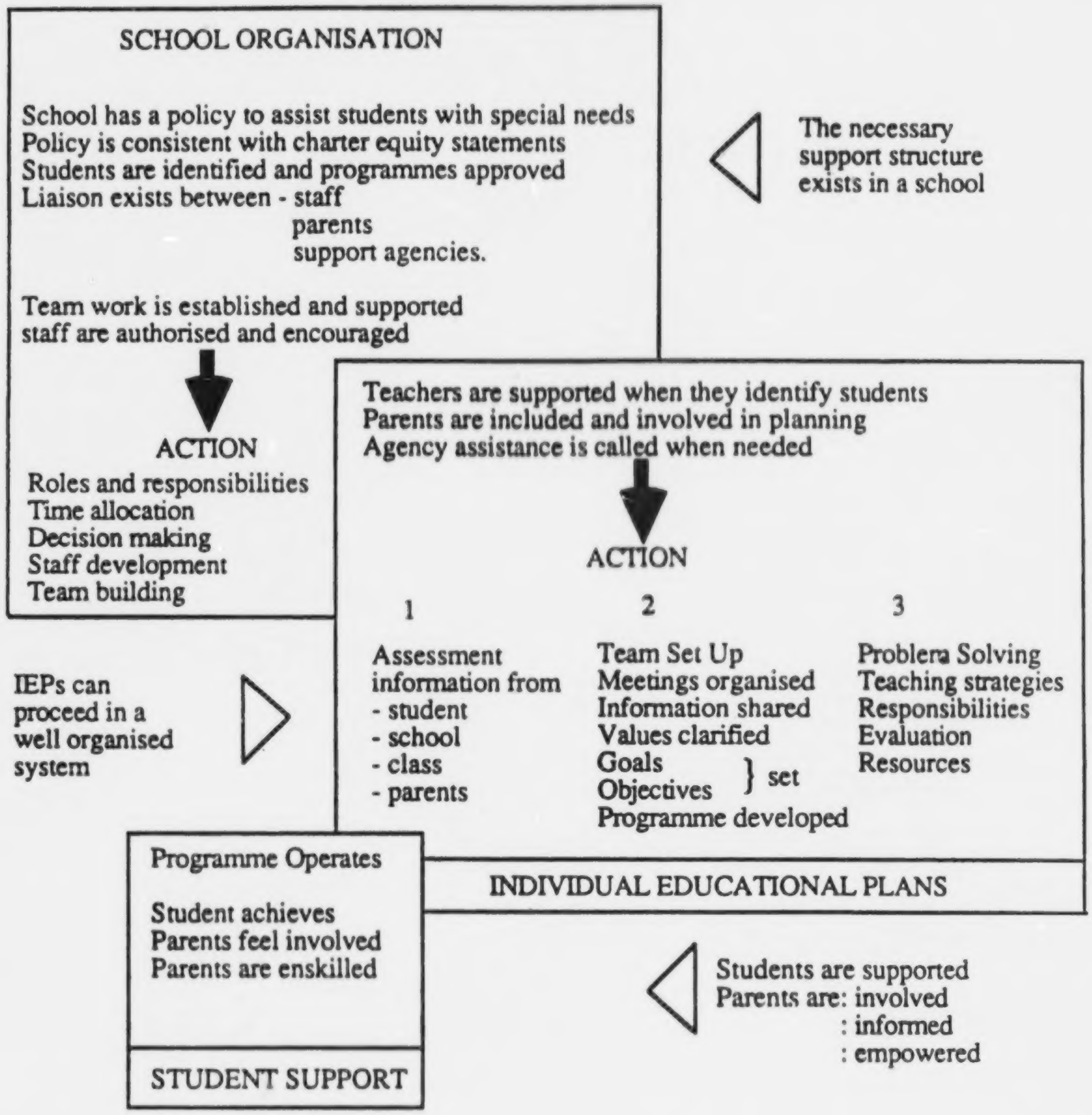
The coordinator will conduct the meeting, provide the agenda and organise the minutes.

Minutes will be circulated to all staff.

The committee will decide on how the key tasks will be implemented, using the mission statement and the school charter statements as the guiding principles.

Where details of a student are to be discussed, this discussion will be held only among those members of the committee who have a need to know the details. This will be held at the beginning of the meeting, following which other members will join the meeting.

Organisation Outline



SCHOOL ORGANISATION

School has a policy to assist students with special needs
Policy is consistent with charter equity statements
Students are identified and programmes approved
Liaison exists between - staff
parents
support agencies.

Team work is established and supported
staff are authorised and encouraged

ACTION
Roles and responsibilities
Time allocation
Decision making
Staff development
Team building

The necessary support structure exists in a school

IEPs can proceed in a well organised system

Teachers are supported when they identify students
Parents are included and involved in planning
Agency assistance is called when needed

ACTION

1	2	3
Assessment information from - student - school - class - parents	Team Set Up Meetings organised Information shared Values clarified Goals } set Objectives } set Programme developed	Problem Solving Teaching strategies Responsibilities Evaluation Resources

INDIVIDUAL EDUCATIONAL PLANS

Programme Operates

Student achieves
Parents feel involved
Parents are enskilled

STUDENT SUPPORT

Students are supported
Parents are: involved
: informed
: empowered

Taken from Thomson, C. & Brown D.F. **Organisational Structure for Special Education in Schools**. Unpublished Seminar paper, 1990.

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Assessment

MODULE 3

ASSESSMENT

This module is in two parts.

The first part

- Outlines the importance of assessment for the IEP process
- Looks at the role of the teacher
- Examines the concepts of ecological and needs-based assessment
- Reinforces the notion of teamwork and shared responsibility
- Supplies a framework for action and give examples of the kinds of assessment questions
- Outlines the major sources of information for the teacher

The second part

- Looks at the sources of information in greater detail
- Concludes with some hints to help the teacher organise the information for the IEP meeting and some general statements about assessment.

Assessment

Part I

Assessment is a key process in the individual education plan and provides the necessary information upon which the IEP is based

Assessment information assists the IEP team to decide:

- **What** to teach
- **How** to teach it
- **How effective** the teaching has been

WHAT ARE THE REQUIREMENTS FOR ASSESSMENT?

The agreement between the Ministry of Education and the Special Education Service states that the IEP programme must be:

> *"based on up to date assessment data gathered in the normal environment of the learner as far as possible by those in day to day contact with the learner"*

This highlights a shift in our approach to assessment in two very important ways:

- **The key people** in the assessment process have changed

- **The importance of the environment** in the assessment process in now more fully recognised.

KEY PEOPLE

> *The parent and the teacher are now the key people in the assessment process rather than the outside "expert".*

Previously, assessment was seen as something which was carried out by a psychologist or other professional from "outside". Usually, the learner was removed from the classroom or home so that a test or a series of tests could be administered. The learner's performance was then measured against some norm and the results reported back. Often the information was not easily translated into good teaching programmes.

These practices have changed over the past few years. In education, the outcome of assessment should be the development of effective teaching programmes and not the categorisation and labelling of the student.

When effective teaching is the outcome of assessment there is a shift in the importance of the roles of the people involved.

The IEP process requires that the information is gathered by those people who are in close contact with the student - that usually means the **teacher** and the **parents**.

Reports from psychologists, speech/language therapists, special education teachers and other outside advisers provide additional valuable information. The more severe the need or the disability of the student, the more likely it is that a greater number of support people will be involved.

The underlying notion of the IEP is that it is a team effort. The parent and teacher's contributions are the major pieces in a jig-saw of information and planning. The parent and the teacher can look to the other members of the team for support and assistance in the assessment process.

THE IMPORTANCE OF THE ENVIRONMENT

Students learn by interacting with their environment.

Teaching/learning is an interactive process. This means that we must gather information about the student, the environment, and the interaction between the two.

The "environment" in this context means all that is happening around the student both at home and at school which affects teaching and learning in both social and academic areas. It includes such things as the curriculum and the demands it places on the student, materials, teaching style, methods and skill, classroom organisation, school organisation and, in some cases the physical aspects of the school environment.

Assessing the student, the environment and the relationship between the two is known as **Ecological Assessment.**

Assessment for an IEP should be ecologically based if effective teaching programmes are to be devised.

This requires that teachers, in particular, reflect on their own contribution to the student's performance. Since they are key figures in the teaching-learning environment of the student their behaviour, style of teaching, pattern of interaction with the class and individual student must be considered.

Examining not only the student but also the environment often leads to intervention by changing the environment rather than attempting to change the student. By widening the focus of assessment one also widens the range of possible interventions.

Although the notion of ecological assessment is widely accepted, sometimes only lip service is paid to it. The focus remains very much on the strengths and weaknesses of the student. Few IEP forms list the strengths and weaknesses of the school environment or the demands the environment places on the student.

If the IEP is to be effective it is important that information is gathered on all elements which affect the teaching/learning process.

An IEP will only be as good as the assessment information it is based on.

It is essential that:

- there is a careful and systematic gathering of information by all members of the team
- this information is shared and evaluated
- a programme is devised based upon that information.

Needs-based assessment

Over the past five years we have moved from a special education system which provided resources based on category of disability to one where resources are to be provided on the basis of educational need.

"Special needs", "special teaching needs" "educational needs" are terms in frequent, current use.

These terms are, however, seldom clearly explained. This leaves the concept of need open to a variety of interpretations.

WHAT IS AN EDUCATIONAL NEED?

The notion of educational need is a complex one and needs are often described differently by different people. For example:

> This student **needs** a computer
> This student **needs** one to one help
> This student **needs** a remedial reading programme
> This student **needs** to learn to get along with others
> This student **needs** a teacher aide.

These are only a few examples and, as you can see, need used in this way can refer to expectations of behaviour, (to get along with others) types of instruction, (one to one help) programmes (remedial reading) and equipment (a computer).

These examples are not so much examples of educational need as strategies and solutions for meeting an educational need. For example, if a student has difficulty with reading, that need may be met in a variety of ways such as having an individualised programme which could be with a peer-tutor, a teacher-aide, the classroom teacher or a parent. His/her **need** is to become proficient in reading. Peer-tutoring, parent assistance are **strategies** for meeting the need.

If the student has difficulty with communication the need to be able to communicate with those around him/her may well be met by the provision of a computer but may also be met by a communication board or a sign-language system. The **need** is for the student to communicate better. The computer, the communication board or the sign-language system are **strategies** for meeting the need. Which strategy is used will depend on the assessment information and the resources available. The IEP team must make that decision.

The IEP team:

- identifies needs
- develops strategies for meeting those needs

It is important not to confuse the **need** with the **strategies** for meeting that need.

It is important not to suggest solutions until a careful assessment of the need has been done.

In this Module, "needs" (special needs, teaching needs, educational needs) will refer to areas in which the learner has had consistent difficulty and which suggests a possible requirement for modification to the programme. These modifications can encompass instructional strategies, curriculum objectives, materials, or modifications to the environment.

A "Special Need" can be thought of in terms of the gap between what a student is able to do and what the expectations of him or her are.

The concept of special need is therefore relative. A student's needs cannot be assessed without reference to the environment in which he or she functions.

Whether or not a student has a special need or not depends **both** on the student **and** on the level of resources available in the environment.

The student's needs cannot be seen in isolation and separate from the demands of the classroom and the curriculum.

Thus ecological assessment is a requirement of a needs-based special education delivery system.

A NOTE ON NEEDS

This training package focusses on the special needs of students and how those needs can be met.

As well as the "special needs" these students share the same basic needs as all the other students such as:

- the need for security
- the need to be valued as a person
- the need to be socially accepted
- the need to be valued culturally

There has been a growing awareness of the "special" needs of girls and cultural minorities and serious attempts to meet these needs are being made.

One of the strengths of a needs-based approach to assessment is that factors such as gender and culture, and how they are dealt with in the school and classroom environment, are an important consideration when gathering the data.

Sources of support and help

You are not in this alone

A basic principle of the IEP process is that of **teamwork** and **shared responsibility.**

The classroom teacher is not solely responsible for effective programming for the learner. That is the responsibility of the team.

Before you begin assessing the needs of the student:

Identify the sources of support and assistance available.

The teacher should look first to the following people for help in the assessment process:

- **The parents**

  The parents are the other key people in the assessment process.

  They can give you valuable information about their child and let you know what is important to them.

  Make contact with them. They will support you in your efforts to meet the needs of their child.

- **The Special Education Service**

  Under the terms of their agreement with the Ministry of Education, the S.E.S. is required to ensure that every learner who needs one has an IEP.

  They must also ensure that teachers and parents receive support and training in identifying needs, providing programming and evaluating the effectiveness of the programmes.

  They must give support and information to service providers.

  The Special Education Service should therefore be a source of support, advice and assistance.

- **The special education teacher**

  This may be a support teacher based in the school or an itinerant resource teacher.

  These teachers have skills in assessing the needs of learners with special needs and adapting curriculum.

  Not all mainstreamed learners are on the roll of a special education teacher however and this source of support and expertise may not be available.

- **Senior staff in the school**

  The teacher can look for support to senior staff in the school. It is likely that a member of the senior staff will be on the IEP team and will have a good knowledge of the needs of the learner and the teacher.

- **The Special Education Committee**

  Many schools find it helpful to establish a special education committee which assists in organising and collecting assessment information for students with special needs, throughout the school.

  The Special Education Service can help in the establishment work of this committee. (See Module 2: *School Organisation* for further details of this).

How to go about assessment

Assessment is a process of identifying and defining an educational need and gathering the information required to ensure effective programming to meet that need.

At the end of the assessment process the teacher should be able to identify:

- what the student can and cannot do
- the expectation for all students in the class
- the areas where the student is having or is likely to have difficulties
- the important factors that are relevant to effective programming for that student.

Start by asking

- What do I need to know?
- How do I find out?

List the specific questions

Identify your sources of information

Gather the data

ASSESSMENT QUESTIONS

The following are examples of the type of assessment questions a teacher may ask. It is not suggested that all these questions must be answered. The list is a guide only.

It is **not** a checklist. Each assessment has its individual characteristics and the questions asked will vary depending on the nature of the need.

The questions are organised here under a number of headings. This is only one of many possible ways the questions could be organised.

Background information

- How many schools has the student attended?
- What difficulties have there been in the past?
- What programmes have been effective in the past?
- Are there any relevant health issues?
- Have any social agencies been involved?
- What is their present involvement?
- Have any professional such as psychologists, speech/language therapists, physiotherapists, etc., been involved in the past?
- What is the present level of involvement?
- What resources have been provided in the past?
- Has there been an IEP?
- Who was involved? Who should be involved?

This type of information helps you to build up a "picture" of your student, particularly if you are undertaking an assessment at the beginning of the school year.

It helps to give you some notion of what the student and his or her family has experienced in the past, which agencies have been involved and what is their present level of involvement, if any.

It can help to indicate possible sources of support and assistance.

It can help you benefit from the accumulated experience of other people who have worked with the student in the past and may still be involved.

Information on the student's motivation and learning style

- What does the student enjoy doing?
- What does s/he avoid doing?
- What does s/he choose to do?
- How does s/he settle to a task?
- What is the completion time and rates?
- What distracts his/her?
- Does s/he perform best working individually or in a group?
- How does s/he respond to success? failure?
- To what does s/he attribute success? failure?
- When is s/he on-task, off-task?
- Which time of the day does s/he work best?
- What does s/he find reinforcing?
- What is his/her attention span? Does it vary in different circumstances?

This type of information assists in finding ways to motivate the student and in identifying the conditions under which s/he learns best.

Social skills

- How independent is the student?
- How well does he or she interact with their peers?
- Is s/he able to follow classroom and school routines?
- Is s/he able to join in with his peers in the playground?
- Is s/he able to share?
- Does s/he make friends?

The questions asked will depend on the age of the student and what the social expectations of the environment are.

This type of information helps the teacher to judge how well the student is functioning in the mainstream environment. It is an important area which should not be overlooked when planning teaching programmes. If a student does not fit in socially s/he is likely to be unhappy and this will affect learning.

The curriculum

- Which curriculum areas are the areas of strength?
- In which areas are there weaknesses?
- How does the student perform in relation to the rest of the class?
- What specific skills has the student mastered?
- What are the sequential steps of the curriculum?
- What are the next sequential gains that the student must make in order to progress?

This type of information helps the teacher to decide what specifically must be taught, that is, to find out what specific skills the student has mastered and what skills require assistance.

The questions should elicit information on the demands of the curriculum and how the student responds to those demands.

Teaching style and classroom organisation

What are the major methods of instruction?
- teacher directed activity
- small group work
- whole class activity
- individual work

Are a variety of teaching methods used?
Is there frequent, relatively immediate and specific feedback?
Are instructions clear?
Are rules and procedure clear?
Are the materials at the appropriate level?
Is enough time given for task completion?
Are good records kept of student performance?
Is the classroom managed efficiently and effectively?
What skills are required for students to function successfully in the class?

The information from this type of question clarifies the demands of the environment for all students in the class.

These questions assist the teacher to reflect on his or her teaching practices and classroom organisation.

SOURCES OF INFORMATION

As with the questions, the sources of information are suggestions only. The teacher may use only a few or, in some exceptional cases, all of them. It depends on circumstances, the nature of the need and the time available.

Records and reports

These may be medical, health and social welfare records, and/or school records and reports from psychologists, speech language therapists, and other educational personnel.

Consultation/interviews with key people

Information may be obtained from the following key people:

- the student
- the parents
- the student's previous teacher
- other teachers
- involved professionals such as psychologists,
- speech/language therapists

These may range from informal contacts to structured interviews and consultations depending on the circumstances.

Observations

These may be observations by the teacher of the pupil in different settings such as in group activities, involvement in an individual task, sport and social settings and playground activities.

It may also mean observation of the teacher/class/student interactions by a colleague or other professional such as a psychologist.

Teachers may also observe their own behaviour in relation to the class.

The observations may be anecdotal running records where a record is kept of everything that is happening, event recording or time sampling. As with other assessment methods, which particular method is used, depends on the circumstances of the individual case.

Tests

Tests, when chosen and used properly and thoughtfully, can provide very useful assessment information. Many teachers routinely administer tests to their class to assess how well a unit of work has been taught and how well the students have mastered the material.

Tests can range from informal, teacher or school devised tests to commercially available standardised or criterion referenced tests. These will be discussed in more detail later in the module. (Page 3.29)

Task analysis

A task analysis is the the breaking down of a complex task or behaviour into its component parts or sub-skills and arranging these in a hierarchy. The teacher then checks where on the hierarchy the student is.

This is a useful source of information to indicate what skills the student has mastered and what he should learn next.

Student work samples

Systematic analysis of the work the student produces is a useful source of assessment information.

By systematically examining what the student is able to do and analysing the errors a wealth of information can be obtained that is useful in planning what needs to be taught.

By examining work samples over a period of time, evidence of progress (or lack of it) can be seen.

This is a source of information used by most teachers in their every day teaching.

Diagnostic teaching

One of the most effective ways of finding out how a student learns and what the difficulties are is to teach something and observe the process carefully.

In the next part of the Module we shall look at these sources of information in more detail.

Assessment

Part 2

In this part of the module we have set out details of the sources of information available to teachers.

Records and reports

Records and reports are useful in building up a picture of the background of the student.

At the beginning of the year, when the student may not be well known, teachers often go over previous records and reports.

These reports may be:

school records
school reports sent to parents
reports from the student's previous school medical reports
reports from support professionals such as speech/language therapists and psychologists

Discussions with teachers indicate that they have different opinions on how useful these records can be. Some teachers prefer to approach the student uninfluenced by knowledge of the student's history while others consider that they gain much useful information from the experience of other teachers and professionals.

Once again, it is a matter of professional judgment. How much value one gets from reports depends very much on the quality of that report.

REPORTS:

- may indicate the concerns and problems experienced in the past
- are most useful if they outline which interventions and strategies have been tried and found successful
- may also indicate agencies that have been involved in the past and who could therefore be sources of information or support or both
- may give some indication of the home circumstances of the student

- may indicate important health information such as hearing, vision, allergies.

Actual test scores, unless very recent, are not usually helpful for planning teaching programmes and out of date test scores are no substitute for current information.

NOTES ON REPORTS

- **Confidentiality**

  Records cannot be circulated between professionals without the consent of the parents. Personal records must be treated with the greatest care and highest professional standards.

- **Access**

  Under the Official Information Act, parents have access to all information held about their child

- **Time**

  Note the date of all reports. While a useful developmental picture can be built up sometimes from a series of old reports, anything older than two years should be regarded as historical.

- **Intelligence scores**

  Intelligence test scores on psychological service reports which are more than two years old should be disregarded. They would now be invalid and should not be quoted in current assessments. In fact, intelligence scores are rarely of much use in planning effective teaching programmes. Their use has now largely been discontinued.

Consulting with key people

Much important information can be obtained from various key people in the student's life:

- the student
- the parents
- former teachers
- support personnel such as psychologists and speech/language therapists.

If the student is new to your class, time spent in consulting with people who know the student can give you information that may otherwise be hard to get.

As with looking at historic records, some teachers prefer to approach the student free of the influence of the views of other professionals. That is their choice. However, if the teacher is careful to analyse the information, noting what is backed up by data and what is professional opinion and perception, valuable information on the student may be obtained, without the teacher being unduly influenced by the perceptions of others.

No assessment of a student is complete, however, without some attempt having been made to gain the views and perceptions of the student and the parents.

THE STUDENT

The student is the central figure in the IEP process.

It is absolutely essential to gain an idea of the student's understanding of what is happening. You need to know how your teaching is coming across to the student.

Talking with the student helps you to understand:

- how the student perceives the situation
- what the student would like to achieve
- what s/he feels s/he is successful with
- what are the areas of difficulty and concern
- what the student's interests and possible motivators are
- what the student feels about things

It also gives you an opportunity to give the student information on:

- your perception of the situation
- the goals that are important to you
- specific aspects of the work

It enables you to make clear to the student that what the student feels, believes and wants are important elements in any programme that might be developed and to assure that student that she will play an important part in any decision making about that programme.

Every teacher has their own style and methods of interacting with and getting alongside their pupils.

A teacher is also very familiar with the approaches that are most appropriate for the age level they teach. How you would approach a five year old will differ greatly from how you would approach a fifteen year old.

HELPFUL HINTS

- Ensure privacy. No-one will willingly talk about themselves if others can hear.
- Ask questions which invite comment and opinion. These are called open questions as opposed to closed questions which invite a "yes" or "no" answer.
- Don't present your views first. Get the student's views. Try to build up a picture of his/her perceptions as you chat to him/her. Remember that his/her picture may be different from yours so don't lead him/her to give your own picture back again.
- Start with general, unthreatening questions. Talk about interests, hobbies, opinions on topics you know s/he is interested in. Then move to more specific questions.
- Have a clear idea before you start what it is you need to know. You may wish to write it down. However, don't just move through a checklist. Go with the flow of the conversation.

One of the things you will want to know is whether a student understands what it is you want him/her to learn, why you want him/her to learn it and what they are supposed to do.

YOU MAY WISH TO CHECK

☐ Does the student know and understand the class routines regarding beginning a task, seeking help and on completion of a task?

☐ Does the student know what it is he/she is expected to learn?

☐ Does the student understand the importance of the material and find it relevant?

☐ Does the student find it interesting?

☐ Does the student feel a sense of accomplishment and mastery or does he/she feel a sense of failure and confusion?

☐ Does the student feel at ease in the social climate of the classroom and school?

☐ Does the student acknowledge that there is a problem?

☐ Does the student feel he/she has enough time to complete assignments?

The importance of how you go about getting the information from the student cannot be overstressed. Remember, you are asking the student to disclose personal feelings and perceptions. Students must feel that they matter and that what they say to you will be taken seriously.

PARENTS

Parents know more about their child (your student) than anyone else.

They are therefore an important source of information when assessing a student.

They can give particularly useful information in such areas as:

- what has happened to their child in the past
- whether the child has any health problems
- which professionals have been involved previously and those who still are
- which intervention strategies have been effective in the past
- what their child is like at home
- how their child spends time out of school
- what their hopes and concerns are for the child
- whether there are any home circumstances that would affect their child's performance at school
- how much they are able to be involved in any programme at home

You should have a very clear idea of what information you need. You will not necessarily have questions in all these areas. The list of things you will want to ask will depend entirely on the needs you have already identified in your classroom.

For example there are a number of reasons why teachers make contact with parents. Teachers have a lot of experience in reporting to parents on student progress. This would be the most usual type of contact with parents.

In Module 5: *Goals and Objectives*, we outlined a system (MAPS) for working alongside parents to clarify values and goals.

The purpose of contacting parents when assessing the student is to get information from the parents which will help the teacher to understand the student better - to build up a holistic picture of the student and also to get specific information which might relate to the student's ability to learn in the classroom.

This type of contact with the parent is particularly useful at the beginning of the school year.

OTHER PROFESSIONALS

Teachers who have taught the student in the past, or in the case of secondary and intermediate schools, teach them at present, can be helpful in:

- giving another perspective on the student
- outlining what they found to be effective strategies
- outlining the student's strengths
- outlining possible motivators

It is important not only to collect such information but also to evaluate it, to identify what are perceptions and impressions and what information is backed up by data.

It is also important to ensure that the highest professional standards of confidentiality are observed. Personal information about students should only be discussed by teachers who have direct knowledge of and interest in the student.

Observation

Observation is an important assessment tool in ecological assessment.

Much assessment information may be obtained by observing the student in the school environment - classroom, playground and other situations.

All teachers observe the behaviour of their students and draw conclusions from what they observe.

For assessment purposes the observations must be much more systematic than is usually the case.

There are a number of different methods of systematic observations. Which one a teacher uses will depend on such factors as the nature of the behaviour in question, the amount of time available and the level of support and training available to the teacher.

The following are a number of the most frequently used methods of observation:

- Anecdotal reports
- Situational analyses
- Event records
- Duration records
- Time sampling

While some of these methods are simple and easy for the class teacher to use, others require a degree of training and practice. The Special Education Service can assist teachers to develop these observation skills. If you feel they will be useful to you, contact your local SES and discuss these with them.

ANECDOTAL REPORT

(Also known as a running record).

This is an account, written in everyday language, of everything that is happening during a specified period of time. It describes the behaviour and interaction with others of an identified student or group of students.

GUIDELINES FOR WRITING AN ANECDOTAL REPORT

- Write down the details of the setting. For example, J is working on a research social studies task in a cooperative group situation with three other classmates, X, S and W.
- Give the starting time and finishing time of the observation period.
- Write down everything the student says and does.
- Record who speaks to him and what is said.
- Give indications of time as you go along.
- **Avoid** interpreting. Merely record what is happening. Do not give your impressions.

An anecdotal record is useful in situations where the teacher is aware that there is a problem but has not yet identified it clearly. An anecdotal record is a good exploratory device which helps the teacher identify specific areas to look at in more detail, for example, what is setting the behaviour off, what is maintaining the behaviour.

Once an acecdotal record is obtained the teacher analyses it to see whether the record indicates what is happening or whether it can provide any information on which to base hypotheses about what is happening. On the basis of these hypotheses, the teacher may be able to gather more specific information.

SITUATIONAL ANALYSIS

This is slightly more structured than an anecdotal report. Not only is behaviour recorded but the observer attempts to identify the events which precede and trigger the behaviour and the consequences of the behaviour.

Example:

Antecedent	Behaviour	Consequence
Teacher tells student to sit down	Student falls off chair	Class laughs
Teacher pauses when student makes an error in reading	Student self-corrects	Teacher praises student
Teacher tells class to go into room	Students take their seats, look at board and carry out instructions	Teacher remarks on speed of carrying out routine

It is not always easy to identify and isolate the complex interactive processes of a classroom.

There may be more than one consequence for a behaviour. The consequence for the teacher and that for the pupil may be different.

It may not always be easy to isolate the triggering event, particularly if that triggering event is the teacher's own behaviour.

However, this method is one commonly used by teachers and one which they report as useful.

EVENT RECORD

(Also known as frequency recording).

This is a sample procedure in which the number of times a specified behaviour occurs in a given time period is counted. Every time the behaviour occurs it is recorded.

It is useful if you wish to record behaviour that has a clear beginning and a clear end, such as calling out in class, swearing, forgetting homework, not coming in regulation dress, coming late.

Behaviour which may continue for a long time is not suitable for this method of recording. For example, being out of seat. A student may only be out of his or her seat once in a thirty minute period but that may have lasted 25 of the 30 minute recording time. An accurate picture of what is happening is not therefore obtained.

Collecting information by this method is relatively easy. It only requires the teacher to record whenever the behaviour occurs. This can be done by making a tick on a card, transferring a token from one pocket/box to another or by using a golf counter.

DURATION RECORDING

This is the method used when the primary concern is the length of time a student engages in a particular activity.

It is useful for recording such behaviours as how long students spend out of their seats, or suck their thumbs, or are engaged on a task.

Again it is only useful when recording discrete behaviours; those with a definite beginning and end.

The teacher requires a stop watch which is set off when the behaviour begins, and stops when the behaviour ends. Usually a percentage of the total observation time is calculated.

A variation of duration recording is called latency recording.

This occurs when you record how long a student takes to begin something once the signal to begin has been given or how long it takes for the student to comply with a request.

TIME SAMPLING

(Also known as interval recording)

This involves a procedure in which an observation period is divided into a number of equal time periods (intervals) and the observer notes the presence or absence of specific behaviours during these intervals and records them.

There are a number of different methods of time sampling:

Spot checks - at the end of each interval a check is made to see whether the behaviour is occuring or not. Is the student engaged in the task or not?

Whole interval - this requires the behaviour to have occurred during the whole interval duration. Was the student engaged in the task all the time.

Partial interval - If the behaviour occurred at all during the interval it is recorded.

Time sampling is somewhat more complex than some of the other methods of systematic observation. It requires quite a lot of organisation on the part of the teachers if they are working on their own, and is extremely difficult to do while teaching a class.

If time sampling is the method best suited to collecting data then it is suggested that the teacher enlist the assistance of a colleague or a member of the Special Education Service.

Analysis of the environment

In an ecological approach it is necessary to assess the important features of the environment. The needs of the student must be viewed within the context of the environment.

The environment places demands on all students. The student with special needs cannot meet all of those demands. It is therefore an important assessment task to outline just what the demands of the classroom are.

A survey of the classroom environment may also point out to the teacher what the strengths and needs of that environment are. Possible intervention strategies which concentrate on altering variables in the environment are easier to identify if a careful survey has been done. Not only can environmental change benefit the identified student who has special needs but it can also be beneficial to other students who are having difficulties.

The classroom teacher is the key figure in the classroom and controls many (but by no means all) of the important variables.

It can therefore be quite a complex task for the teacher as s/he must examine his/her own teaching behaviours and strategies.

However, an analysis of the classroom environment can be used for the benefit of all students in the class and not just the student with special needs.

Once a careful analysis is done it is likely to remain relevant and valid for some time.

Classroom environment checklist for teachers

What are the main methods of instruction used in the class?

- teacher presentation
- discussion
- written assignments
- research/experiment/project work
- copying from the board
- worksheets
- audio visual materials
- other

What proportion of time is spent on each method?

How much time do the students spend working:

- individually
- in cooperative groups
- as a class
- peer tutoring

☐ CLASSROOM MANAGEMENT

Write down the class rules and procedures.

Check whether:

- they are clear
- students are able to indicate what they are
- they are reinforced consistently

Write down the consequences of appropriate and inappropriate behaviour.

Check whether:

- they are clear
- students are able to indicate what they are
- they are applied consistently.

☐ TASK MANAGEMENT

Are the instructional goals clear? Can the teacher list them?

Have the skills necessary to complete the task been identified?

Is the purpose and the importance of the lesson made clear to the students?

Are instructions given clearly? Are checks made to ensure the students understand the instructions?

Is student activity monitored? How?

Is there an established mechanism for the student to seek assistance? What is it? Are students able to identify it?

Are there established procedures for those who finish early? What are they? Are students able to identify them?

Are there established procedures for those who fail to complete the task? What are they? Are they known and understood by the students?

☐ MATERIALS

Are the materials matched to the skill level of the students?

Has the readability level of reading material been checked?

Will the material enable the students to achieve success?

Is it appropriate and interesting?

Is a variety of materials used?

Are materials modified to meet the needs of those students who are advanced beyond the average level and those who do not meet the average level?

☐ RECORDS AND EVALUATION

Is there frequent measurement of progress of all students?

Are up-to-date records kept of this progress?

Are these results analysed in order to highlight areas of difficulty and mastery for the class as a whole and for individual students?

Is this information used to plan future instruction?

☐ FEEDBACK

Do students receive feedback information quickly and regularly?

Does the feedback give specific information on performance (either academic or social behaviour)?

Are mistakes corrected?

Are there mechanisms for ensuring that mastery is eventually reached?

What are they?

HOW THE SURVEY MAY BE PUT TO USE

If a teacher conscientiously completes the previous survey an analysis of the results may suggest a number of intervention strategies for identified students with special needs.

For example, if the teacher is using the same material for all members of the class, it is unlikely that it will meet the needs of all students unless the class is a highly homogeneous streamed one.

Therefore, one of the first areas to explore is how the material can be adapted to ensure that the student with special needs can cope with it. Adapted material is likely to benefit a number of the other students.

Examining the most frequently used methods of instruction may highlight the fact that the student may not have the necessary skill to benefit from that method. The skills may have to be taught, or alternative methods of instruction found. A teacher may use cooperative groups as a major instructional technique. The student may not have acquired the necessary social skills to cope with this. If much work in a class entails copying from the blackboard, alternative methods may have to be found for the student who has great difficulty in this area.

Examining the rules and procedures of the classroom can be a first step in a task analysis to identify what skills are necessary to ensure that the student fits in easily to classroom routines. This can be particularly important for those students who have major needs or who are entering the mainstream from a segregated setting.

The situation can be quite complex in secondary schools where the demands and standards of different classrooms vary. Some students can have difficulty coping unless requirements of the teacher are made explicit and are clear.

A more general survey of the school environment can also be completed, particularly if the student has social needs in the playground or outside the classroom.

Assessment of the environment is an important aspect of assessment for IEPs. It is, however, an aspect which is frequently neglected with most of the assessment energy going into assessing the characteristics of the student. It can lead to very effective and efficient intervention strategies with beneficial spin-offs for a number of students.

Tests

All classroom teachers are familiar with testing. It is the method of assessment most commonly used in our schools to classify, group and stream students and to judge progress in curriculum areas.

There are a number of different types of tests. It is useful to know which kinds of tests should be used for which purpose.

CLASS TESTS

Many teachers administer routine weekly or bi-weekly tests on regular class work, such as spelling or maths. These tests enable them to keep track of progress in these areas.

At the end of a unit of work, as a routine procedure, a test may be administered to assess how well the unit has been taught and how well the students have mastered the material.

Most schools also set common tests, across a syndicate or across a form, to check on student progress.

Usually these tests are devised by teachers, although sometimes they may be part of a published module or provided in the textbook.

Teacher devised tests, designed to access what the student has learnt, are an important tool in assessment for programming purposes.

However, class tests are often used in very limited ways - merely to record marks or to give an indication of how well or badly students are doing in relation to their peers.

Analysis of the content of the answers can give useful information on:

- what the student has actually learnt
- the areas of difficulty for the student
- the effectiveness of the teaching.

The real value of class tests relies not in placing the student on a continuum of marks but in informing teachers of their effectiveness.

Another important use of class tests is their feedback value to the students. Just as teachers receive feedback on their own effectiveness and the needs of students, so students can receive feedback on how well they are doing or how much more they need to do. The value of the feedback is, however, affected by how quickly the feedback is given and whether it is delivered in a positive manner.

Assessment of students with special needs should be incorporated into the routine assessment of the class. The teacher should therefore analyse the student's results in order to gain as much information as possible for teaching purposes.

NORM-REFERENCED TESTS

These tests are designed to compare an individual's performance against that of peers.

The score is judged against the scores of a sample group of students deemed to be similar in certain characteristics.

When the results of a test are given in terms of age level then the test is likely to be a norm-referenced test.

Norm-referenced tests can be useful in that they give an indication of the size of the gap between where the student is and where you would like them to be.

Tests of reading ability are frequently norm-referenced. Knowing a student's reading age can be an extremely important piece of information when planning a programme. It helps to ensure that the material is at the right level.

However, the highest professional standards must be observed in the use of these tests. Any teacher using them must be satisfied that they have been standardised for New Zealand students (many American tests have not) and that the results are applicable to the student who has taken the test.

Issues of gender and cultural equity are frequently raised when the pros and cons of some norm-referenced tests are discussed. Teachers should be aware of the debate that has taken place regarding the use of intelligence tests and group tests of scholastic ability, such as TOSCA *(Test of Scholastic Abilities)*.

Results from these tests should be interpreted with caution. Sometimes they are said to be indicators of a student's "potential". They cannot and do not measure potential.

Some norm-referenced tests give useful information, meet ethical standards of testing and are relatively quick to administer. Others, particularly tests of "intelligence" and group tests of "ability" should be carefully checked for usefulness.

As a good rule of thumb, before administering a test or arranging for one to be administered, teachers should ask: "How useful will this test be in helping me to plan a better programme for the student?"

CRITERION-REFERENCED TESTS

A criterion-referenced test is one which describes what a student knows or can do.

The student's performance is measured against a standard or criterion.

Agreed-to criteria are set and the student's performance measured against those criteria. The criteria can be set by anyone who knows and understands the curriculum area. Sometimes the criteria are taken from published criterion-referenced tests. Sometimes they are devised by the teacher.

Criterion-referenced tests are also referred to as competency tests.

There are a number of examples of criterion-referenced tests in common use in our school system.

- ☐ The Arvidson Spelling Scheme, a previously very popular spelling scheme, is one example. Students can move from one of the seven levels of the scheme to the next by meeting a criterion or standard. If students meet the standard (no more than three errors) on a 25 word test comprising words from one level they proceed to the next level.

- ☐ The Six Year Net is another example. Certain standards of reading achievement which should be reached after one year of instruction are set and student performance is measured against those standards.

- ☐ Shorthand and typing are two areas in the secondary school that have always worked on a criterion-referenced system. Proficiency certificates are awarded in these subjects on the basis of the number of words per minute a student can type or write in shorthand.

- ☐ Proficiency certificates in many physical education activities are examples of a criterion-referenced approach. Students are awarded a certificate stating that they have reached a certain criterion, for example, they can swim 100 metres or float for 60 seconds unaided.

- ☐ *Key Math: Diagnostic Arithmetic Test* (Connolly, A.J., Nachtman, W., and Pritchett, E.M., 1971) is an example of a popular commercial criterion-referenced test in basic arithmetic skills. It includes a range of subtests in content areas, operations and applications.

In criterion-referenced testing the student's performance is not compared to that of the other students but against a standard or criterion.

The **advantages** of this approach are:

- the items on the test are closely related to instructional objectives. The standards are the skills you are trying to teach. Objectives are therefore easy to set.
- the test makes clear what the student can and cannot do thus giving good information on which to base further teaching. If the student cannot achieve the standard, it becomes the objective to be aimed for.
- it is motivating for the student. The student is not being compared with other students but against their own past performance. This is very important for students with special needs as they frequently have a history of failure and even with their best effort are at times unable to match the "norm" for their peers. This approach provides achievable goals for them.
- a criterion-referenced approach provides better evidence of the effectiveness of a programme for a particular student.

Criterion-referenced testing is an extremely useful assessment tool when planning effective programming. It is an approach that most classroom teachers are already familiar with but they perhaps do not recognise their activities under that name.

Task analysis

A task analysis is the breaking down of a complex task into its component parts and arranging the component parts or sub-skills into a hierarchy.

In the context of assessment, a task is simply the behaviour that is required of the learner.

If the teacher finds that the student has failed to meet a standard in a curriculum area s/he may wish to do a task analysis of the skill in order to know where on the hierarchy of skill the student falls - that is, which sub-skills have been mastered and which have yet to be learned. This enables the teacher to know what skill to teach next.

In the process of assessment and teaching, task analysis is therefore closely connected with criterion referenced testing.

HOW DO YOU ANALYSE THE TASK?

Watch someone else do the task taking note of each behaviour and the sequence in which it is performed.

or

Do the task yourself analysing the steps you take as you go.

Having analysed the skill the teacher must assess where on the skill hierarchy the student is. Judgement must be used in testing this out. Sometimes, once an analysis has been done, it is perfectly clear which level the student is at. If not, it is a better policy to "test down" so that you finish the assessment at a level where the student is achieving success.

Here are some examples. Remember, the most common fault in writing a task analysis is to miss out simple parts of the chain because you assume too much about what a person can already do.

EXAMPLE 1

The following is an example of task analysis of a physical skill:

The required behaviour is that in swimming, Jamie will float on his back for 5 seconds.

Task analysis of floating:

- Squat down with one foot placed behind the other
- Submerge shoulder in the water
- Place head back in water, ears submerged, eyes open
- Place arms out from body at 45 degree angle
- Push backwards off the floor slowly, arching back gently
- Inhale and hold breath
- Float motionless

Remember, it is necessary to check that the student has mastered any prerequisite skills. The teacher will have checked that Jamie is not afraid of water; can squat down, moves his body easily, can follow oral instruction while carrying out these tasks. (In other words, all this will not have been assumed).

Having completed the task analysis and been satisfied that the student has all the prerequisite skill the teacher must then observe the student attempt to perform the task and find out which of the subskills he has mastered.

In Jamie's case he can do everything up to step 5 but he does not move from step 4 to step 5. This tells the teacher clearly what must be taught. Jamie must learn to push gently off the bottom of the pool while arching his back.

The teacher may wish to make some hypotheses at this stage as to why Jamie is having difficulty in doing this and test these hypotheses while teaching. For example, the teacher may hypothesize that Jamie is too frightened to leave the security of having his feet firmly on the ground. In that case s/he may wish to teach him by physically supporting him in some way at first and then gradually reducing that support. Or s/he may hypothesize that he has not quite mastered the physical action. In that case the teacher may wish to have another student who is proficient demonstrate it to him.

Hypotheses can only be tested out by teaching and observing the outcomes.

Task analysis can therefore help not only with **what** to teach but also with **how** to teach it.

Doing a task analysis for a physical skill is simpler than task analysing many academic skills. Teachers are required to examine very closely the requirements of the academic curriculum and work out in an orderly and sequential way the sub-skills that must be mastered in order to meet those requirements. This can initially be a time-consuming task. However, once complete, it will benefit all the students in the class and will be useful over a long period of time.

EXAMPLE 2

At research tasks, given a paragraph, Jane will be able to paraphrase it in at least three sentences which are related to the topic, legibly, with no more than one spelling error, two errors in punctuation and complete accuracy in grammar and syntax.

Therefore to meet this required behaviour the student must read a paragraph, comprehend the main ideas, think of something to say and write a paraphrase. There is also a standard or criterion stated which requires that she writes to a standard of legibility, spells the words correctly and applies the appropriate conventions of punctuation and grammar.

This immediately demonstrates the complexities of the task. We have here not one behaviour but four or five separate skills:

- Reading texts, comprehending, retaining the topic and its details.
- Generation of ideas in oral language.
- Transfer of ideas from oral to written language.
- Handwriting
- Spelling
- Knowledge of conventions of print
- Knowledge of conventions of grammar.

For the purpose of this example we will concentrate on a possible task analysis for Numbers 1 and 2 - the generation of oral paraphrases. Remember again, check your assumptions about what prerequisite skills are there already.

A task analysis of this skill might look like this:

- Can read a sentence and recall the key idea orally.
- Can read a sentence and offer an oral paraphrase of its content while retaining the meaning.
- Can read a paragraph of two sentences and identify the topic sentence orally
- Can read a paragraph of two sentences and recall the topic and one detail orally.
- Can read a paragraph of two sentences, paraphrase the topic orally while retaining the meaning.
- Can read a paragraph of two sentences, paraphrase the topic and a detail orally while retaining the meaning.
- Can read a paragraph of three sentences, paraphrase the topic and two details orally while retaining the meaning.

It is unlikely that students will be able to write on a topic if they cannot express their ideas orally.

Having completed the task analysis the teacher must test out where the student is on the hierarchy and make the next step the teaching objective for the student.

Jane is able at this stage to complete a paraphrase of the topic of a two sentence paragraph. Jane still cannot add a paraphrase of one of the details contained in the paragraph.

This will indicate to the teacher that Jane needs more practice linking details before attempting the oral paraphrase.

At the same time in this complex academic task the teacher must also be checking progress in the other component areas such as spelling, handwriting and conventions of print. The teacher must decide if a skill hierarchy is the best way of judging this. Depending on the age and skill level of the student an error analysis procedure might produce the more useful information. This will be discussed later in the module.

In assessment, it is a matter of teacher judgment which assessment method to use.

ANALYSIS OF STUDENT'S WORK

This is an assessment strategy that many teachers are familiar with, particularly in the area of reading. Analysis of running records in reading is an assessment technique that has become widely used particularly since the introduction of the Reading Recovery Programme.

By noting consistent errors and strengths a running record gives the teacher valuable information on what the student has yet to master and therefore what needs to be taught.

The same principles can be applied to other areas of the curriculum such as maths, handwriting, spelling and conventions of print.

A sample or number of samples of written language produced in class can provide a wealth of assessment data if a careful and systematic examination is done of what the student can do and the errors made.

For example:

Handwriting:

Note whether all the letters touch the line.
Are the letters the same size. If not, are there any particular letters that are consistently larger or smaller?
Are the spaces between the words uniform?
Are the loops well formed?
Are a, d, g, o, p closed?
Are the words separated by clearly defined spaces?
Are the errors consistent or one-off?

Punctuation:

Are capital letters correctly applied?

Do sentences start with capitals and end with full stops?

Is direct speech correctly dealt with?

Is there correct use of commas?

A similar analysis can be done on grammar, spelling and language construction.

An analysis such as this gives detailed information that will make the setting of objectives easier. Specific areas of difficulty are identified and can be the content of future teaching programmes.

An analysis of work can also be a very useful basis for discussions with the student on setting future goals. Discussing strengths and errors in their work not only gives the student good feedback, but helps to clarify to the student the goals that he should be aiming for.

Diagnostic teaching

One of the most useful sources of information in assessment is diagnostic teaching.

This is not diagnosing problems.

It is what many teachers do, without necessarily thinking of it as "assessment".

Diagnostic teaching is used to assess how the student interacts with the teaching materials and the teaching methods.

It involves planning a teaching strategy and then observing carefully how the student responds.

The teaching is carried out in an hypothesis testing way. In other words the teacher tries something, sees how it works and then alters the teaching patterns or material in light of the response of the student.

This provides very useful information for effective programming.

Diagnostic teaching fits very well into the continuous assessment-programming-evaluation model on which the IEP is based.

Much of the initial assessment information will be utilised to devise the initial programme. How the student responds to that programme will then provide very important information for the next IEP meeting.

As with all assessment techniques diagnostic teaching must be done in a systematic manner, with careful observations made and records kept.

Notes on assessment

- Assessment is not an exact science. There are no recipes or formulae that can simply be followed. It is a process which requires the teacher to use her professional judgment. In this module a general framework has been outlined. Within that framework the teacher will develop her own methods and strategies depending on the needs of the student and the skills and the time available to the teacher.

- Teachers already have the skills of assessment. In assessing students who have special needs these skills may be extended beyond the usual range of activities. This is where the strength of the IEP process, if it is working effectively, becomes apparent. There should be support people on the team who can assist the teacher to develop further skills. The Special Education Service is contracted to the ministry to ensure teachers get help in this way.

- Assessment is a continuous process. Teaching programmes should be continually revised on the basis of new information coming to hand.

- Try to incorporate the assessment of students with special needs as much as possible into the regular routine of the class. Class tests and student work samples are two areas where, with a little extra systematic analysis, important assessment information can be gained.

- Keep the recording process as simple as possible. When choosing between different possible assessment methods choose the one you know you will be able to cope with.

- Concentrate your efforts on getting information that you, as the classroom teacher, can use in order to develop more effective teaching programmes for your students. When considering any assessment method, always ask, "Will it give me information that will be useful in teaching?"

- Time is an important element. Methods of assessment that are efficient of teachers' time are preferable. If a time-consuming technique is required, ask for help.

- Be aware of the possibility of bias in assessment. Be careful of any norm-referenced standardised tests that you use. Check that they are culture and gender appropriate. An ecological, needs-based assessment approach encompasses cultural, gender and other factors inherent in the student.

- Assessment is no longer an activity carried out by an outside expert. The teacher is a key figure.

Organising the information for the IEP meeting

Once the assessment information has been gathered it is necessary to arrange it in such a way that it can be communicated clearly and easily to the other members of the team.

The assessment process should provide the teacher with information which will help to clarify:

- what the student is able to do
- what you would like to see him/her do next and in the future
- what areas you think are most important
- what interventions/teaching strategies you think would be most effective.

These ideas need not be fixed. The discussion at the IEP meeting may indicate that there are other priorities which you may not have considered. You may be unsure what is likely to be the most effective intervention. Some of the other members of the team may have specialist knowledge or expertise to help you.

However, it will facilitate the meeting if you have your assessment information organised in a way that helps you to communicate it quickly and easily to the rest of the team. How teachers and parents do this is a matter of personal preference. Formats and forms are likely to be most successful when they are developed by the people who use them.

The following assessment summary sheet included here is a suggestion only. Teachers and parents may find it useful to start with and then adapt it to suit their own needs.

Whatever format is used it is important that there is an emphasis on what the student is able to do and what has been achieved.

Assessment Summary Sheet

Student's name ____________ Completed by ____________

Date ____________

What the student can do	What you would like him/her to be able to do

What are the most important things to be achieved in your order of priority.

Comments

Massey University

The IEP Meeting

MODULE 4

THE IEP MEETING

This Module outlines

- the framework of the meeting
- Notes the need to meet task requirements
- Notes the needs of the participants

Also tells you

- The stages of the meeting
- Details of each of the meeting stages
- How to chair and facilitate a meeting

Gives you

- A before-during-and-after checklist

The meeting framework

An essential element of the IEP process is the IEP MEETING.

This will vary in size, in the level of formality, location, length of time taken and frequency. **There are no set rules.**

When arranging any meeting a major consideration should always be the wishes and needs of the parents. Every attempt should be made to hold the meeting in such a way and in a location that ensures the parents feel comfortable - psychologically as well as physically.

Many parents do not feel comfortable in the school setting and may prefer to have the meeting at home or at another location in which they are at ease.

Some parents will prefer to have their whanau with them in their own setting.

Other parents will be quite familiar with and at home in the school so that the school might be the most convenient location.

Whatever the "style" or the location of the meeting, certain tasks must be accomplished. These are outlined later in this module.

Whether the IEP team is a large multi-disciplinary team or consists only of the teacher, the parent and the senior teacher, communication and teamwork are important elements in the process. This module discusses these issues.

Remember, no meeting can be successful if it fails the important test: that members feel comfortable. Even large and quite formal meetings can be handled in such a way that people feel at ease. Small meetings which are informal will not necessarily be easy if they are badly managed.

Comfort is an important test because without it the purpose of the meeting cannot be achieved. The purpose is an IEP statement which is agreed by all, where there is a will to make it work and where cooperation has become well established.

Meetings can be formal or informal, large or small, held at school or in the home or elsewhere. To be successful they must achieve certain targets and complete certain tasks.

More information can be obtained in Module 8: *Negotiation* and Module 9: *Communication*.

Functions of meeting

Effective meetings have two major functions:

Task Activities

People Activities

Task Activities are those activities which carry forward the work of the meeting. They are the purpose of the meeting.

In the IEP meeting the TASK requirements are:

- *sharing information*
- *setting goals and objectives*
- *listing teaching strategies*
- *assigning tasks*
- *setting criteria for evaluation*
- *setting a review date.*

People Activities are those activities which help group members develop satisfying relationships within the group. They are the key to successful task activities. How you carry out the tasks reveals your people skills.

The PEOPLE requirements are similar to those in most groups:

- *ensuring everyone has a chance to speak*
- *checking perceptions*
- *dealing with differences of opinion*
- *treating everyone with respect and equal value.*

To ensure an effective meeting takes place **both** sets of requirements must be attended to by the group.

It is a relatively simple matter to check whether the task requirements are being effectively attended to. The IEP document, which is the product of the meeting, will indicate whether or not all the tasks have been completed.

It is not quite so simple to check the people requirements. If the people requirements are not being met this is usually indicated by a number of **Danger Signals**

- *apathy*
- *nit-picking*
- *ignoring or "rubbishing" other people's views*
- *domination of the group by one or two people*
- *private conversations going on during the meeting.*

The list is not exhaustive and is presented as an indication that action is required.

When any of these indicators are present the group should attend to them and take time to discuss them. If the chairperson doesn't rise to the challenge, a member of the group may have to take action.

One people activity that is often completely overlooked is the action that must be taken **prior** to the meeting. If parents are not included in planning, their agreement sought, their wishes respected prior to the meeting, it will be difficult to remedy the problem later, even with skilful chairing.

The task requirements will not be efficiently and effectively achieved if the people requirements are ignored.

The IEP meeting

A number of tasks must be completed during an IEP meeting. These follow a logical sequence which assists the team to complete the work effectively and in the right order.

The stages of the meeting are as follows:

1. Introductions and agenda setting
2. Review of strengths and needs (sharing of information)
3. Development of goals, objectives and teaching strategies
4. Decision on resources committed and required
5. Writing the plans
6. Conclusion of the meeting.

Remember though that preparation for the meeting ensures these steps will flow smoothly. For example, you will see in the first stage that the agenda is set. If the preparation has been thorough, this is really a confirmation exercise as the parties to the meeting will have been asked already what they hope to see on the agenda.

1. INTRODUCTIONS AND AGENDA SETTING

The initial part of the meeting is very important as this can set the "tone" for the rest of the meeting.

It is the role of the convenor/chairperson/facilitator to ensure that everyone is introduced. Not only the names of the group member should be given but also their role and interest in the learner.

The parents will have been consulted about the membership of the group beforehand but particular care should be taken to ensure that they know who everyone is and why they are there.

Efforts should be made to ensure that everyone is comfortable physically. Plan for this; one good method is to sit in each chair as you have arranged them beforehand. Ask yourself if you would be comfortable sitting there.

Efficiency of the meeting can be greatly improved if a little time is spent at the beginning of the meeting to confirm people's wishes and set the agenda. This involves ensuring agreement on such matters as what is to be discussed, priorities and time allocations.

All group members should be asked if there is anything they particularly wish to discuss. The items should be grouped in clusters according to similarity and if necessary rough estimates of time to be spent on each should be made.

Some of this will have been done before the meeting and the agenda drawn up. This can save time. Though everyone has a copy of the agenda already, it is still valuable to check that all group members are in agreement and do not have anything they wish to add.

2. REVIEW OF STRENGTHS AND NEEDS

The development of an appropriate programme depends on the accurate identification of the learner's strengths, needs and current levels of performance.

This is the stage of the meeting where all the group members "pool" their knowledge and information. It is the sharing and interpreting of this information that forms the basis of the development of the programme.

Valuable time can be saved if all reports and assessment documents are sent to all group members before the meeting. This ensures that everyone has had time to read all the relevant information and relate it to what they know.

3. DEVELOPMENT OF GOALS AND OBJECTIVES

This is an extremely important part of planning an appropriate instructional programme and one that research tells us is frequently very poorly done.

Setting goals and objectives is a skill which takes practice and time to learn.

Setting of goals is an activity which involves values. It is important that there is agreement on the goals to ensure that the group is striving towards a shared target. Particularly in the initial stages this may take some time to complete.

Before the initial IEP meeting it may be helpful to organise a MAPS meeting or some such meeting which will help to clarify the general direction of the programme. This is explained in detail in Module 5 on the setting of goals and objectives.

The strategies to be used to achieve the goals and objectives should also discussed and outlined at this stage of the meeting.

4. DECISIONS ON RESOURCES

The IEP should state the resources that are required to meet the goals set for the learner.

These resources may be found from within the school's existing resources or may be additional and be obtained from outside agencies.

The resource component of the IEP often creates a tension because of the gap between demand and supply. Good communication and problem solving skills are needed to arrive at solutions that everyone can live with.

The issue for the IEP team is first and foremost the needs of the student and how these can best be met.

If the student needs extra resources which cannot be met by the school, then it is essential that this information is written into the document.

Discretionary resources will only be allocated on the basis of need as outlined in an IEP.

The assistance of the Special Education Service should be sought for the allocation of discretionary resources.

5. WRITING THE PLAN

The decisions the IEP group makes must be recorded and written up in the IEP document.

It is not mandatory for all members to sign the document but it is probably a good idea for them to do so. It ensures that everyone has read the document and agrees with its contents.

Some IEP groups prefer to have someone write up the plan after the meeting on the basis of the decisions made at the meeting. This is fine if the group prefers it that way and the writer ensures that a copy is sent promptly to all members of the group.

There are many variations of IEP forms available. There is, however, no requirement to use any particular form or set of forms.

6. CONCLUSION OF MEETING

This is an important stage in the meeting. It is the time when all the major decisions are reviewed and agreement by all parties given publicly.

All tasks to be undertaken should be specified and who is to be responsible for their completion stated clearly and agreed to.
It is important that a date (if only tentative) is set for the next meeting.

If copies of the IEP document are not available for everyone at the meeting it should be established who will be responsible for ensuring that everyone will receive one and when.

The chairperson/convenor/facilitator should ensure that no-one is leaving the meeting feeling that they have "unfinished business", or in an angry or emotional state.

Everyone should leave the meeting having agreed to the major decisions and with a commitment to implementing them.

Appointment of facilitator/chairperson/convenor

A successful IEP meeting requires coordination, communication and advance planning.

This is more likely to be achieved if the IEP team appoints a chairperson/facilitator/convenor. The title is a matter of personal preference.

This person runs the meeting and ensures that the necessary arrangements are carried out beforehand

Having one person nominated as a co-ordinator provides a focal point for communication for all members of the team.

Who this person should be is a matter for the IEP team to decide.

Any member of the team - principal, teachers, special education teacher, parent, member of the SES - could take this role. The team may wish to have a co-ordinator who is not a member of the team but who has the necessary skills.

Role of the facilitator/chairperson/convenor

BEFORE THE MEETING

- Ensure that the date and venue are acceptable to all group members, particularly the parents.
- Arrange the venue, taking note of factors such as the need for a non-threatening, comfortable environment.
- Request agenda suggestions from the group.
- Draw up a tentative agenda.
- Collect all assessment information available.
- Distribute all necessary documentation for the meeting. This will include the assessment reports, tentative agenda and a reminder of time and place of the meeting.

DURING THE MEETING

- Welcome everyone as they arrive.
- Bring the meeting to order. This does not have to be done in a formal way. However, it is necessary to ensure that there is a division between the pre-meeting "chat" and the meeting itself.
- Introduce everyone and clarify their roles and their interest in the learner.
- Arrange for someone to take notes.
- Review the tentative agenda. Make additions and alterations if necessary. Clarify the time scale.
- Keep the group on task.
- Be alert to any feelings of confusion in the group and try to clarify them.
- Be particularly aware of the use of jargon and try to explain the meaning of any jargon used or have someone else explain it, preferably the person who used it.
- At the end of each stage of the meeting:
  - check that everyone has had an opportunity to contribute;
  - check whether anyone is not clear about what has been decided;

  - check there is agreement. Do not proceed until there is agreement;
  - summarise what has been decided;
  - check that the person taking notes has recorded the decision.

- At the end of the meeting summarize the meeting and review the major decisions.
- Ensure that all the actions to be taken have been clearly specified and roles and responsibilities allocated and accepted.
- Check that each group member is clear about the decisions and comfortable with them.
- Set a tentative review date.
- Suggest everyone sign the IEP document. If it is in rough form only, arrange for signatures to be added later.
- Distribute copies or arrange to have copies sent within a specified time.
- Thank everyone for their participation and close the meeting.

AFTER THE MEETING

- Check with the person who took the notes to ensure s/he is clear about distribution of the document, if it has not been distributed at the meeting.
- Make a note of any items which have to be followed up for inclusion on the agenda of the next meeting.
- Put your feet up and relax.

Goals and Objectives

MODULE 5

GOALS AND OBJECTIVES

This Module

- Discusses how to set goals and objectives
- Defines goals and objectives
- Suggests ways to get them right

Shows you

- The McGill Action Planning System
- How to get help to use MAPS

And tells you

- How an objective is analysed
- The steps to writing an objective

Finally gives you

- A checklist

Goals

> The key idea about a goal is that it is an ideal, a "place" toward which you are striving.
>
> (Schmuck 1972)

Goals indicate a state of affairs that you would like to see happen. They represent what you value.

When an IEP team outlines the goals for a student it indicates what they consider important in a global, general way for the student.

GOALS ARE GUIDES

They indicate the direction in which you intend to go.

They should be clearly stated and agreed to by everyone.

A GOAL is a long range global statement which indicates the general intent of what you would like to see happening for the student.

OBJECTIVES are shorter term steps to be achieved on the way to meeting the goal.

Too often in the past we have been influenced by a deficit model of disability. The focus has been on what the student could not do, consequently expectations for achievement have been too low.

The normalisation movement, which encourages people who have disabilities to take a greater part in the community, has widened horizons.

When setting goals:

- *be positive*
- *consider the student's strengths*
- *do not be unnecessarily restricted by students' needs.*

When defining goals it is O.K. to dream a little.

Goals can be influenced by dreams and hopes.

Objectives must be based on data.

The goals of the school and the goals of the parent may be different.

It is therefore important before the IEP process is put into action to spend some time ensuring that there are clear and shared conceptions of the major goals.

It is worth putting a little time into this because, if goals are not carefully set, misunderstanding and miscommunication may occur later.

At the beginning of the IEP process, before the initial IEP meeting it is strongly recommended that a meeting is held to discuss goals and the general direction of the programme.

This will help with the initial information gathering and assessment process. Assessment can be influenced by the goals or the direction of the programme.

Concentrating on where you would like to be, rather than on the deficits in the student, will affect the kind of information you gather.

If you do not have some notion of the goals, you may not gather the most relevant information.

If your school has a special education committee, setting goals will be easier. Such a committee will have covered a lot of the ground in a general way. The school's goals for students with special training needs will already be established. These committees are discussed in Module 2 : *School Organisation*.

The McGill Action Planning System

M.A.P.S.

MAPS is a process developed at McGill University in Canada by Marsha Forrest and other workers to help a group of people with an interest in a child or person with special needs to dream and plan for that person's future.

The MAPS system is a useful process which can assist teams to clarify the values, hopes, wishes and fears of the parents and other significant people in the learner's life. It thereby assists the team to set goals which include everyone's values and aspirations.

This system - or a modified version of it - may be useful in establishing general directions or goals for the programme before the initial meeting is set up.

The MAPS can facilitate the IEP process in a number of ways but mainly because it helps to give a clear sense of direction. It helps to broaden vision. Many parents of children with special needs stop dreaming or don't allow themselves to dream any more. The MAPS process helps them to start dreaming again.

It also gives an opportunity to verbalise fears and shows clearly what everyone concerned with the student must work to avoid.

It helps us to see past the disability or needs, to the individual who has a history of strengths, as well as needs.

Outlining the ideal day is an excellent way to assist in structuring experiences which are as normal as possible for the student.

NOTE

MAPS is not a process that would be required for every child for whom an IEP is necessary.

Whoever organises and facilitates a MAPS session must have quite a high level of interpersonal communication skills and a large measure of sensitivity. That person should have built up a level of trust and credibility with the student and his/her parents.

You can be trained in the use of MAPS. Talk to your Special Education Service office or the local branch of the IHC society.

Some of the advantages of MAPS might still be retained by using a modified version: For example, someone who has good rapport with the parents may go through the questions with only the parents or the student and parents. It may not be necessary to involve a large group or run the meeting exactly as envisaged by Forrest and her co-workers to obtain some of the advantages of the process.

The process is summarised in the following article by Terri Vandercook and Jennifer York in *Impact*, Vol 1 (2) 1988.

York, J., Vandercook, T., Heise-Neff, C., & Caughey, E. (1988).
Regular class integration ... etc. *Impact, 1*, 13.

Integrated Education: MAPS To Get You There

Terri Vandercook and Jennifer York

The McGill Action Planning System (MAPS) (Forest, Snow, & Lusthaus, in press) is a positive and affirming process that assists a team of adults and children to creatively dream and plan, producing results that will further the inclusion of individual children with labels into the activities, routines, and environments of their same age peers in their school community. The principles underlying and guiding the process include: (1) integration, (2) individualization, (3) teamwork and collaboration, and (4) flexibility.

The MAPS planning typically occurs in one or two sessions. Participants are arranged in a half circle, with the facilitator positioned at the open end of the circle. The information and ideas generated during the process are recorded on large chart paper which serves as a communication check during the session and as a permanent record when the planning is finished. The role of the facilitator is to elicit participation of all team members in the collective design of an integrated school and community life for the individual student.

Following are the seven questions which comprise the MAPS process:

(1) *What is the individual's history?*
Aside from the individual for whom the planning is occurring, family members are the most important members of the circle because they typically know the individual better than anyone else. Because of this, family members, and the individual to the greatest extent possible, are asked to spend a few minutes talking about the individual's life history, including some of the milestones.

(2) *What is your dream for the individual?*
This question is intended to get people to develop a vision for the individual's future, to consider what they want for that person, and to look beyond the current reality. Those dreams can become reality if there is a common commitment to strive for them. The dream question forces team members to identify the direction they are heading with the individual; only then can specific plans to be made for realizing the vision. This is not to say, however, that the vision, plans, or expectations are set in concrete; they will be challenged continually as more is learned about how to facilitate inclusion in the school community and as positive outcomes are realized. Depending upon the age of the individual, it may be difficult to dream for them as an adult; if that is a problem, team members can be encouraged to think just a few years ahead.

(3) *What is your nightmare?*
This is a very difficult question to ask the parents of any child, yet an extremely important one. The nightmare presents the situation that the members of the individual's team and others who care for him or her must work very hard to keep from happening. Parents frequently relate the nightmare as a vision of their child being alone.

(4) *Who is the individual?*
Everyone in the circle participates in responding to this question. The participants are asked to think of words that describe the individual, i.e., what comes to mind when they think of the person? There are no right or wrong words. Participants take turns going around the circle until all thoughts have been expressed. Participants can pass if nothing comes to mind when it is their turn to supply a descriptor. When the list is complete, the facilitator asks certain people, usually family and peers, to identify the three words from the list that they feel best describe the individual.

(5) *What are the individual's strengths, gifts, and abilities?*
So often when educational teams get together, they dwell upon the things that the individual cannot do as opposed to identifying and building upon the strengths and abilities of the individual. The facilitator asks the participants to review the list which described the individual as a way to identify some of his or her strengths and unique gifts. In addition, they are instructed to think about what the individual can do, what he or she likes to do, and what he or she does well.

(6) *What are the individual's needs?*
This question provides an opportunity for all the team members to identify needs from each of their unique perspectives. When the list of needs is complete, family, friends, and educators are asked to prioritize the identified needs. The list of assets and the identified needs are a primary basis for design of the educational program.

(7) *What would the individual's ideal day at school look like and what must be done to make it happen?*
Because MAPS is a process to assist teams to plan for the full integration of students with high needs into regular age-appropriate classes, frequently attention to this question begins by outlining a school day for same age peers who do not have labels. Next, the team begins to strategize ways that the needs identified in the previous question can be met in the context of the regular education day. Finally, initial planning occurs for the supports needed to achieve successful integration. As learners reach middle and high school age, the ideal school day will include instruction in both regular education and a variety of community instruction sites, e.g., home, worksites, stores, and recreation places.

The MAPS process provides a common vision and road map for all team members, which enables them to be supportive and effective in furthering the integration of learners with disabilities into regular school and community life.

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BEST COPY AVAILABLE

Objectives

Objectives are statements that describe what a student will be able to do after a prescribed teaching programme.

Objectives are sometimes referred to as behavioural objectives, instructional objectives, or programme objectives. The term used to cover all these in this module will be simply "objectives".

WHY WRITE OBJECTIVES?

Specifying the goals and objectives for the learner in the written educational plan is a requirement outlined in the agreement between the Ministry of Education and the Special Education Service.

The Ministry requires that a programme be developed to meet the needs of the individual learner and that criteria for evaluation be outlined. Writing objectives facilitates both these requirements.

Instructional objectives therefore are a required feature of the IEP document.

ADVANTAGES OF WRITING OBJECTIVES

There are good educational reasons for writing objectives other than satisfying administrative requirements. They:

- encourage systematic planning, instruction and evaluation.
- encourage accountability.

  The objectives are available to be examined by all interested parties. It is clear when the objectives are achieved or not achieved.
- help to motivate the student.

  The student knows exactly what is expected and what is being aimed for. If the student is part of the IEP group this motivation is likely to be increased even more.
- make teacher preparation more orderly and relevant.

  Teachers know exactly what skills they are trying to teach. This assists them to adapt the lesson to meet the student's needs.
- provide a basis for the evaluation of student progress.

When a student achieves or fails to achieve an objective it signals to the teacher that perhaps a change of teaching strategy is necessary or that the objective was unrealistic.

- facilitate communication.

  When objectives are specified and clearly written down, everyone understands exactly what is expected and when it has been achieved.

- help to clarify the teaching programme.

The objectives are the basis of the teaching programme.

PITFALLS TO AVOID

Research indicates that writing the objectives is one of the most poorly performed parts of the IEP.

Frequently what are written as objectives for the learner are in fact strategies for the teacher and the other professionals involved.

Sometimes the objectives are too vague and more in the nature of a broad direction or a goal.

Sometimes they are specified in such a way that it is not possible to check in a precise way that they have actually been reached.

SO

Check that the objective is something the **student** will be able to do - not what the teacher will do.

Check that it is clear and specific.

The components of instructional objectives

Objectives are much more specific than goal statements.

An objective must contain four components:

- *A description of the BEHAVIOUR that the learner will display*
- *The CONDITIONS under which the learner will display the behaviour*
- *The CRITERIA for successful performance of the behaviour. This is sometimes referred to as the EVALUATIVE component.*
- *The name of the LEARNER who is involved.*

It is a good idea to ensure that the objective contains the student's name, rather than just "the learner" or "the student". This emphasizes that the objective has in fact been designed to meet that particular student's special needs and personalises the document.

While objectives do not have to have a time requirement it is good practice to state the time in which they are expected to be achieved.

Steps to writing an objective for an IEP

When a teacher or an IEP team is writing objectives they might find it helpful to ask the following questions:

"What do I want the student TO BE ABLE TO DO?"

"When and where will the behaviour take place?"

"What evidence will I accept that it has been done successfully?"

1. "What do I want the student TO BE ABLE TO DO?" This is the core of the objective.

   Answers to this question might be:

   - *"To read a passage at a seven year reading level"*
   - *"To throw a ball"*
   - *"To use capital letters and full stops correctly"*
   - *"To hang up her jacket"*
   - *"To sit in his seat"*
   - *"To complete a 2 paragraph summary of a chapter"*

   The answer to this question gives you the BEHAVIOUR component of the objective.

   The behaviour component of the objective must be **observable.**

   You must be able to see or hear the behaviour so that it can be described and evaluated. Two or more people should be able to agree that the objective has been reached.

   Care must be taken to ensure that the right kind of verb is used when describing the behaviour. Some verbs describe actions that are either unobservable or it would be difficult to agree that the behaviour was actually occurring.

   In the example:

   "Jenny will know her number facts", 'knowing' is not an observable behaviour. You are faced with the question "How will we **know** she knows?"

   It would be better to say *"Jenny will be able to answer orally 20 questions on her basic number facts with 100% accuracy."*

   In the example:

   George will be able to recognize the difference between blue and red, again the question is, "How will we **know** that George can recognize the difference?"

"Given fifteen objects a number of which are red and a number blue George will be able to name the colour of every object correctly."

This is an activity that teachers do all the time without perhaps being aware that they are doing so. They are used to devising ways of checking whether what they have taught has in fact been learned by the student.

In writing the behaviour component of an objective you consider what you want the student to learn and write the objective in a way that enables you to check whether s/he has learnt it.

When writing objectives the following are examples of the kind of verbs to be AVOIDED because they describe behaviours which are open to different interpretations by different people:

feels
thinks
enjoys
likes
realizes
understands
sees
knows
learns
appreciates
discovers
recognizes

The following are verbs which might be USEFUL when writing objectives:

mark
count orally
say
repeat orally
label
name
write
place
state
point to
circle
tell what

These lists are not exhaustive. They are intended to give some indication of observable and unobservable actions.

Although certain verbs should be avoided in the writing of objectives, it does not mean that students do not do these things. Students *do* learn, feel, think, enjoy, appreciate but the task in writing objectives is to find ways to discover and measure what is happening.

The technical term for this is "to define operationally".

Finally, the behaviour component of the objective has nothing to do with the actions of the teacher, parent or other professionals. Note you do not ask, "What actions am I going to take". The answer to that question will tell you what strategies will be used to help the student reach the objective. There is another section in the IEP document which deals with strategies. (Module 7: *Programme Adaptations*)

If the group decides that the student would benefit from, for example, speech/language therapy then an appropriate objective must be written for that programme. It would then be essential to have the speech/language therapist's input into the writing of that objective. It would not be appropriate to say as an objective "James will attend speech/language therapy". That is a strategy, not an objective.

2. **Having established the behaviour component you then ask "Under what conditions will s/he be able to do it?" "When and where will the behaviour take place?"**

Here the answers might be such phrases as:

- "During instructional reading"
- "During the phys ed lesson"
- "In all written work"
- "Whenever he comes into the classroom from outside"
- "During maths time"

These answers give you the **conditions** component of the objective.

They tell you the **when** and the **where** of the behaviour. They make it clear what the parameters for the behaviour are.

For example, you may be aiming eventually for the learner to be able to generalise the ball throwing skill learnt during the phys ed lesson in the playground but as an initial step the programme will concentrate on developing the skill in the more controlled environment of the phys ed lesson. It helps to focus the teaching activity.

A learner may successfully use full stops and capital letters in formal written expression lessons but may not generalise the skill to writing reports and answering comprehension questions. The conditions component clarifies the full range of situations where she will be expected to demonstrate the skill.

You may have as the behaviour component of the objective "Jason will remain in his seat". Obviously it is not appropriate for Jason to remain in his seat throughout the entire school day. There are formal and informal lessons in many classrooms. The conditions component helps clarify and specify the expectations for Jason.

The **conditions** component makes clear the range of circumstances for the behaviour.

3. The final question is "How will I know the objective has been attained successfully!" or "What evidence will I accept that it has been done successfully?"

Here a performance level is set which will indicate that the student has learned the skill under the set conditions.

This gives you the **criteria, or evaluative** component.

Criteria, like other components of objectives, must be selected according to the needs of the student.

They should be realistic - neither too hard nor too easy.

Criteria typically state one of the following:

(i) Percentage of accuracy ("90% accuracy") or number of correct responses ("17 out of 20 correct")

(ii) Time limits ("within five seconds")

(iii) Degree of assistance needed ("with a non-verbal prompt", "with his hand held")

(iv) Number of correct occasions ("5 consecutive times", "for 10 mornings in a row")

(v) Duration of time ("for 2 minutes")

Objectives and sub-objectives

Sometimes it is necessary to break down the objective into a number of sub-objectives to make the teaching task clearer and progress easier to achieve and measure.

For example, if the objective is:

"Josh will hang up his jacket on his peg in the cloakroom before he enters the class everytime he comes in from outside, without being reminded".

Some sub-objectives may be:

"Josh will hang up his jacket on his peg in the cloakroom with the assistance of his buddy."

"Josh will hang up his jacket on his peg in the cloakroom by himself on the verbal reminder by his buddy of - "Josh. Jacket".

Not all objectives will require sub-objectives. If tasks are fairly complex, however, it is helpful to break then down into their component parts and write sub-objectives for each part. This provides a guide for what to teach first.

Usually the IEP states the objectives and the teacher writes up the programme.

Sub-objectives can be part of this programme.

In other cases, an objective may be discussed at the meeting and found to require too much time to fit the plan on this occasion. In this case, sub-objectives can be drawn up and one or more of them included in the IEP depending on how long it is expected to take to achieve them.

How to decide on the objectives

Be certain that your objectives clearly reflect what you are trying to achieve for the student.

There is rarely enough time to provide instruction in all the areas where the student may need special assistance. It is therefore necessary to establish some priorities in the selection of objectives.

The IEP team should establish these priorities at an early stage.

Some questions to ask:

Will attaining the objective help the student to reach one of the goals?

Goals are general statements of direction. Objectives should help the student towards the attainment of the goal.

Have the parents been listened to?

Parental input will have been important in setting the goals. It is highly probable that if the objectives help the student toward the goal they will also be in line with parental wishes.

Is the skill functional?

Will attainment of the skill help the student to function more successfully in a mainstreamed setting or a less restrictive environment than the one they might be in at present?

Is the objective meaningful to the student?

Students are much more likely to learn something they are interested in learning, or, which has some personal meaning for them.

Is the objective relevant to the student?

It may be necessary for the student to learn something because it is important to future academic and/or social development without the student being aware of its importance, or interested in it. Teacher and parental input is important here.

How does it fit in with other skills the student requires to learn?

Will the student have the opportunity to use the skill? For example, it is not helpful to spend a lot of time trying to teach children to tie shoe laces if they have not yet learned to put their shoes on, or, if they only own shoes with velcro fasteners.

How does the objective fit in with the classroom programme?

If the rest of the class is learning folk-dancing during phys ed, it is not helpful for the student to have an objective involving small ball handling skills. Not only does this pose a logisitics problem for the teacher but it is important that students with special needs should have a programme as close to the regular curriculum as is appropriate and possible.

Does it fit the age and skill level of the class?

Age appropriateness is a difficult and controversial topic. However, wherever possible objectives should ensure that both the student and peers will perceive the activity as appropriate for their age and skill level.

Have any transitions been considered?

If the student is to be involved in a transition within the next year then consideration should be given to ensure the development of skills the student will need in the environment into which s/he is moving, for example transition from early childhood to school; from primary school to secondary school; from school to work. Consideration should be given to transition well in advance.

Has the student's past rate of progress and the length of time spent trying to learn the skill been considered?

It may be necessary to leave that area and move to another. It may be helpful to the student to have a "break" from an area where s/he is failing to obtain success and concentrate for a while on an area where s/he can be boosted by successful experiences.

Children who have severe disabilities

In designing programmes for students with severe disabilities it is essential that the team give priority to skills that are functional. Powell, Rainforth, Hecimovic, Steer, Mayes, Zoback, Singer, (1985) suggest that the team consider the following questions regarding the functionality of the skill for that particular student.

- Does this student need or use this skill in his or her everyday routine?
- Does someone else have to help him or her perform this skill?
- Will learning this skill allow the student to be more like his or her "normal" counterparts?
- Will learning this skill enable the student to participate in the community?
- Will learning this skill encourage peers to respond to him or her appropriately?
- Does the student need this skill both now and in the future?

Objectives in the area of social behaviour

One of the aims of mainstreaming is to assist students with special teaching needs to become part of their school and wider community.

To achieve this, students must develop social skills which will enable them to interact successfully with their peers. It is essential that the IEP contain objectives that will assist them to achieve this.

It is also important that socially unacceptable behaviours that work to impede good social relations be decreased.

It is more difficult to write objectives for this area compared with skills in curriculum areas. To a certain extent values decisions are involved and an awareness of local social and cultural norms is required. Having the support of an IEP team facilitates the process.

It is necessary to "operationalise" good social interactions within the context of the student's environment; to check which of these behaviours the student does or does not possess and use this as the basis for setting objectives.

Format for instructional objectives

A management aid for the team in writing instructional objectives is the adoption of a standard format and the use of a check list.

As the team gets to be more experienced the need for this will lessen. Initially, however, a consistent format ensures that all components are included and the objectives are relevant and of value for the student.

No one format is necessarily superior to another. It is a matter of preference.

The following is a suggested format and checklist that a team may wish to trial initially. Teams may wish to develop their own preferred format.

BEHAVIOUR

CONDITIONS

CRITERION OF SUCCESS

CHECKLIST

- Does the behaviour describe what you want the student to do?
- Is the student's name mentioned?
- Is the behaviour observable?
- Will you be able to measure the behaviour?
- Are the conditions clear and specific?
- Are the criteria for evaluation realistic?

- Will two or more people be able to agree on when the criteria have been reached?

- Will attaining the objective move the student closer to achieving one of the long term goals?

- Is the skill a useful one for the student?

- Will it help the student integrate more successfully?

- Is it meaningful to the student?

- Does it fit into the classroom programme?

- Is it age appropriate?

- If the student will be involved in a transition to another sector of the system or to the workforce in the near future, will the skill be useful in the new environment?

- Has the student been trying to attain this objective unsuccessfully for a long time? If yes, should you consider a different objective where the student might achieve some success.

There are no "right" or "wrong" answers to these questions. They are listed to assist the team check on the format and value of the instructional objectives.

This format and checklist may be useful to teams who are just beginning to develop their skills in this area.

The Written Plan

MODULE 6

THE WRITTEN PLAN

This Module

- Gives you the important details of the written IEP plan
- Shows you some sample forms others have used

Also tells you

- How important it is to use your own way of writing a plan

Gives you

- A checklist to ensure you have got it right!
- Sample IEP forms

The written plan

As part of the IEP process a written plan is produced.

WHAT ARE THE ADMINISTRATIVE REQUIREMENTS OF THE DOCUMENT?

There is little official guidance or direction as to what this written document should contain.

In the agreement between the Ministry of Education and the Special Education Service (December 1989) it is stated that the plan should be based on up-to-date information gathered in the student's usual environments by those in day to day contact with the student.

THE PLAN SHOULD CONTAIN:

- *specific objectives for the learner*
- *detailed teaching strategies*
- *who will be responsible for what*
- *resources needed to meet the objectives*
- *detailed evaluation procedures*

There is no official format for an IEP

The format and contents of the IEP document are a matter for local decision making, provided the requirements noted above are met.

Devising the format of the document is a task which the teams should approach in a formative way - in other words by trying something out and constantly refining it in the light of experience.

When attempting this task teams should consider the following:

- The IEP is a working document.

  All those responsible for ensuring that the student achieves the objectives should have the IEP document to hand for easy referral.

- The IEP document forms the guide for instruction and as such it should be clear, unambiguous and easy to follow.

  Consequently it should not be a lengthy document.

> The team might find that it is helpful to have separate sheets on which to record the major assessment findings, the objectives, the strategies and the resources required.
>
> If this is the case then consideration should be given to summarising the information in a succinct and usable form on to one summary sheet.

The United States has had almost fifteen years of experience with IEPs, and in New Zealand many psychologists, speech/language therapists and special education teachers have had a number of years of experience in devising IEPs. There are consequently a number of different formats available in text books and from sources such as the SES.

It is advisable to gather many different formats together and examine them carefully before you devise your own. The perfect form for your team may already exist.

THERE IS NO "CORRECT" IEP FORM. WHAT SUITS YOU AND YOUR TEAM IS WHAT YOU SHOULD USE

In writing the IEP consideration should be given to the inclusion of the following:

- Names of participants and type of involvement with the learner

  It is important that a record of who attends the meeting and their reasons for attending is kept.

- Long term goals

  Try not to have too many goals. List them in order of importance.

- Present levels of attainment

  It is not necessary to have levels of attainment and objectives in all areas. Choose the most important areas and concentrate on working on a few at a time.

- Objectives

  Again it is a good idea to have a few well chosen objectives that are considered the priority objectives by the team. The objective must, of course, bear some relationship to the long term goals and be related realistically to the present level of attainment of the student.

- Evaluative criteria and procedures

  The evaluative criteria (how you are going to judge whether each objective has been achieved) may be included as part of the objective or may be written separately under a separate heading. It is a matter of choice. However, it is essential that they are included.

- Strategies

  This section outlines what actions will be taken to ensure that the learner achieves the objectives. Strategies must not be confused with the objectives themselves.

  The strategies are not usually specified in detail. The teacher, parent or other professionals involved will work out a detailed teaching plan after the meeting. However the strategy should be outlined in a general way.

  There are many different strategies that can be employed. The following is a list of examples only and is by no means an exhaustive list:

  use of buddy system
  peer tutoring 1/2 half hour daily
  contract system with appropriate reinforcers
  home reading programme with parent involvement

daily individual maths programme devised by teacher
and given by teacher's aide.
1 hour physiotherapy twice weekly

- Resources

The resources which the team consider are needed in order for the learner to achieve the objectives using the strategies agreed upon must be outlined.

e.g. 1/2 hour of teacher-aide time daily
part-time teacher hours to enable the teacher to train peer tutors
2 hours of physio per week

Examination of the resources available in the school should be made before discretionary resources are requested.

The IEP should specify exactly which objectives are to be achieved by the use of the resources. Details of how the resources will be used to achieve those objectives should be provided.

- Responsibilities

This section states who will be responsible for ensuring that the learner reaches the objective.

The statement of responsibilities is extremely important. It must be clear who is in charge of what part of the programme.

No-one should be on the list if they have not been consulted. Indeed, it is preferable that anyone who is named in this section, should actually be at the meeting. No-one should be made responsible for anything without their agreement.

- Mainstreaming

If the learner is mainstreamed in a regular education class and is to be withdrawn, the length of the withdrawal period and the educational and social reasons to justify this should be given.

If the learner is in a special unit then it is important that the amount of time to be spent with age peers is stated.

Statements of withdrawal conditions are not an absolute requirement of the IEP document. However there are good reasons for including them. They help to monitor the student's progression into the mainstream and enable the team to examine and clarify the reasons for withdrawal. This procedure also helps to ensure that no student is spending more time in a segregated setting than is necessary or justified.

- Comments

It is a good idea to have some space for a general comments section. There may be important considerations and issues which the team wishes to note and record.

Actions may also need to be undertaken which are not directly related to the objectives but which the team wishes to ensure will be done, for example:

to enrol the learner in a community activity such as a gym class or swimming group

to look for opportunities to include the learner in the school drama production or to go on the next Standard 3 class trip.

Following the checklist are two examples of IEP forms. Develop your own to suit the needs of the team, or adapt these examples.

INDIVIDUAL EDUCATION PLAN[1] **FOR**..

(PRIMARY) **D.O.B.** ..../........./.........

School/Facility .... **Meeting Date:** ..../........../........

Team Members: ....

....

....

Resources Currently Available to Student: (Travel/Equip/Personnel)

Resources Needed as result of today's meeting:

Resources: .... Actioned by:....................

Check learning areas of concern:
Circle Priorities

Oral lang ( )
Writ. lang ( )
Reading ( )
Maths ( )

Gross motor ( )
Fine motor ( )
Social Beh. ( )
Pers/Emot. ( )

Self Help ( )
Work Hab ( )
Home ( )
Community ( )

	a.m.		p.m.
M			
T			
W			
T			
F			

Timetable Key

Hours per week

R = Reg. Class, no extra assistance
R.I. = Reg Class, in-class assistance
W = withdrawal assistance

Additional Notes:

Next Meeting: ....

---

[1] Developed by Adrian Benson (1991).

Learning Area	WHAT is happening NOW? Present performance levels	WHERE are we heading? Long term goals	WHAT should be learned NEXT? Short term teaching objectives

EDUCATION PLAN

NAME .... DATE OF BIRTH ...../....../..... SCHOOL .... TEACHER ....

ADDRESS .... CLASS .... MEETING HELD AT ....ON ....

....

.... THOSE PRESENT ....

LONG TERM GOALS

....

....

.... AGREED REVIEW DATE ....

....

....

AREA	PRESENT ACHIEVEMENTS	NEXT STEP TOWARDS THE GOAL	BY	NEW ACHIEVEMENT MEASURES	PERSON RESPONSIBLE	BROAD OUTLINE OF PROGRAMME TO BE FOLLOWED	NEEDED RESOURCES

TIME IN REGULAR CLASS	GENERAL COMMENTS

SIGNED: ....

Checklist for the IEP written document

☐ Is the IEP clear and easy to follow?

☐ Was it developed by a team of people?

☐ Does it state who was involved, their interest in the learner and their contact phone numbers?

☐ Was the parent a full, participating member of the team?

☐ Does it outline the long term goals?

☐ Are the objectives based on the needs of the learner as determined by the information collected by the team and shared at the meeting?

☐ Are the objectives also related to the long term goals?

☐ Do the objectives state what the learner will be able to do at the end of the teaching programme?

☐ Is it clear how achievement of the goals will be measured?

☐ Is it clear who will be responsible for each part of the programme?

☐ Does the plan state when the programme will begin, how long it will be provided, and when it will be reviewed?

☐ Are the resources that will be needed clearly specified?

☐ If the learner is to be withdrawn from the mainstream are the reasons for this clearly stated?

☐ If the learner is in a segregated unit does the document specify time to be spent with his/her age peers?

☐ Has everyone signed the document to show agreement?

☐ Does everyone have a copy of the document?

☐ Has a tentative date been set for the next meeting?

Programme Adaptations

MODULE 7

PROGRAMME ADAPTATIONS

This Module:

- outlines ways of adapting programmes
- examines ways of teaching effectively
- looks at cooperative learning and peer tutoring
- suggests adaptations to materials
- looks at intervention strategies for students with specific difficulties

Adapting the programme

Mainstreaming has increased the range of individual differences in the classroom.

In the past two decades teachers have become more aware of the need to cater for a wider range of abilities in their classrooms. One set of curriculum demands will meet only the needs of a narrow range of "average" students. The needs of the more academically able and less academically able must also be met.

Students with special needs almost by definition will require some modification to the regular programme. Previously many of these students would have been educated in segregated special classes or schools. They now must have their needs met in mainstream classrooms.

There are, however, many other students in the classroom who are unable to cope with a curriculum designed for the "average" student. Adapting the programme can also have many beneficial effects for a large number of these students, and not only for the "identified" special needs student.

Adaptations to the programme should not be done in a haphazard way. They should be based on a careful assessment of the student's needs, the curriculum, the teaching methods and teaching style of the teacher. If the teacher has conducted an ecological assessment he or she will have this information available.

In adapting the programme, the teacher can alter

- the teaching strategies
- the teaching structures
- the materials

This module will outline some of the specific adaptations a teacher can make in the classroom, in these areas to improve the learning of the student. These adaptations have been tried by teachers in the past and found to be efficient and effective.

There are a large number of ways of adapting the programme. In this module there is no attempt to outline **all** the possible methods, but some suggestions are made. However, how it is done depends on the collective creativity, knowledge and skill of the IEP team.

The module also outlines some specific adaptations that have proved to be useful for helping students who demonstrate specific behaviours that are not conducive to efficient learning.

NOTE

Sometimes (although very rarely) a complete departure from the regular class programme is necessary. In the vast majority of cases, students will be able to undertake some form of adapted programme. However, where a school has made a commitment to include all the children in the neighbourhood, an alternative programme may be required to meet the needs of a student with sensory disabilities. In these cases, specialist support and resource people will be part of the IEP team and will assist in such programming.

Teaching strategies

There are a number of factors which are important in the learning of all students. Although they appear "basic" and "common knowledge", they are not always put into practice. Students with special needs require more systematic and careful teaching. A careful ecological assessment should highlight whether any of these factors require attention.

The first thing a teacher should ask before undertaking adaptations to the programme is:

"Am I implementing the basic principles of effective teaching?"

Factors for improving learning

ACADEMIC LEARNING TIME

This is sometimes referred to as *academic engaged time*. It is one of the most critical factors in improving learning. The more time a student spends engaged in academic tasks the better the outcomes will be. This has been clearly shown by classroom research. The teacher must check whether there is a discrepancy between the time allocated for a task and the time the student requires to do it. If there is a difference, the teacher must devise strategies to increase the time for the student.

PRACTICE

A skill, whether physical or cognitive, must be practised in order to be mastered. Frequently, skills are taught but not enough time is given to enable the student to practise them to mastery level. A teacher must ensure the provision of appropriate practice. Students with special needs may need more practice opportunities than the rest of the class. A variety of practice formats maintains interest.

APPROPRIATE MATERIAL AND PACE

The materials must be appropriate to the level of the student. An obvious example is the reading level of content material. A readability check as part of the assessment process will reveal whether the material is at the appropriate level. Adaptations to material are discussed in more detail later in the module.

The programme must be structured in such a way that students can move through it at a pace they can deal with.

MONITORING AND FEEDBACK

To learn efficiently, learners must be informed about the accuracy of their work. They should be informed whether they have got it right or not. If they have not got it right, then they should be provided with corrective feedback - that is, information that will help them to get it right. Feedback must be prompt and regular to be effective.

REINFORCEMENT

Catch them being right as much as possible and provide an appropriate and agreed upon reinforcer.

COMMITMENT

Gaining the student's commitment to learning is also an important factor in improving learning outcomes.

We know that students are more likely to stay on task and master the task if:

- they understand why they are undertaking it
- their attention is directed to the critical features
- present skills and knowledge are built upon
- what is taught is reviewed at the end of the task.

It is therefore important to cue the student to these aspects of the task.

By attending to these principles and ensuring they are being implemented, the teacher is likely to improve the learning outcomes of a number of students in the class and not just the student with identified special needs.

These aspects of the programme should be checked out before more elaborate adaptations are considered.

Modifying the teaching structures

Modifications of teaching structures might be considered when the assessment data gathered from an environmental survey indicate that the classroom systems do not meet the needs of the identified student, or a number of students; or that there is not enough variety in the methods of instruction employed.

There is a large number of ways in which this might be done. Choice depends on teacher preference and skills, and the needs of the student.

This module outlines only two teaching structures or methods of classroom organisation which have been found to be particularly useful in facilitating mainstreaming and meeting the needs of students with special needs.

They are:

Cooperative Learning

and

Peer Tutoring

Cooperative learning

Cooperative learning is a method of teaching in groups which is designed to enhance the learning of each individual in the group.

A vast body of empirical evidence has been accumulated by prominent researchers - David and Roger Johnson at the University of Minnesota, and Robert Slavin at Johns Hopkins University in Baltimore.

The research shows that cooperative learning promotes achievement in academic areas as well as teaching social, cooperative and interpersonal skills.

Cooperative learning has been used in all curriculum areas and across all age groups.

The essence of cooperative learning is the insistence upon mastery of the task by all members of the group. There can be no "hitch-hikers" in cooperative groups because the group's work is not finished until any one member can represent the group in demonstrating mastery of the task.

The use of cooperative groups increases the number of students who can experience academic success. When expected to learn in individualistic or competitive ways many students simply cannot reach the criterion for success. This does not just apply to the student with special needs. Some students just lack confidence or just do not respond to competitive conditions. It has been suggested, for example, that girls learn maths better in cooperative groups.

Along with the academic skills, a number of other skills are taught in the cooperative group approach. These include:

- problem-solving skills
- face-to-face interaction skills
- accountability to oneself and to others
- the analysis and performance of a task
- collaborative skills.

Cooperative activities can vary in style. Which activity is used will depend on the teacher's judgment of what is needed to do the job. They can include:

Small cooperative group work. Most teachers are familiar with this approach. It has just as much place in secondary classrooms as it does in the primary school. Small groups are given specific tasks, roles for each member, targets to meet and a requirement to produce work of a high standard through cooperative procedures.

Jig-saw. The task is divided into a number of component parts. Everyone must learn one part and teach it to the others. Small groups may also jig-saw as part of their work.

Cooperative games. Games are usually competitive and eliminate students as the game proceeds. Cooperative games require students to support each other as the demands of the game get tougher and tougher. Team cohesion, loyalty, peer support all get taught in cooperative games.

A cooperative learning structure is particularly helpful for students with special needs. It facilitates social interactions with their peers and helps them to achieve. Cooperative groups place students within a peer support system.

Having a cooperative classroom is not just a matter of having a collection of students working together. Certain requirements are made of the groups and the individuals in the groups:

- individual accountability - everyone must learn
- positive interdependence - sink or swim as a group
- group processing - feedback within the group and from the teacher on how well the group is working
- mastery requirements.

It takes time to learn the skills required to run cooperative groups. David and Roger Johnson visited New Zealand recently. Their workshops stimulated much interest among teachers. As a result, a number of teachers formed small support groups, to assist each other in developing the necessary skills.

If you want to find out more about cooperative learning you should try to find out whether there is a group operating in your area.

The Special Education Service will be able to offer you materials and support should you wish to set up cooperative structures in your classroom.

Basic elements of cooperative learning

POSITIVE INTERDEPENDENCE

Students must feel that they need each other in order to complete the group task, that they "sink or swim" together. Some ways to create this feeling are through establishing mutual goals (students must learn the material and make certain groups members learn the material), joint rewards (if all groups members achieve above a certain percentage on a test, each will receive bonus points), shared materials and information (one paper for each group or each member receives only part of the information needed to do the assignment), and assigned roles (summarizer, encourager of participation, elaborator).

FACE TO FACE INTERACTION

No magic exists in positive interdependence in and of itself. Beneficial educational outcomes are due to the interaction patterns and verbal exchanges that take place among students in carefully structured cooperative learning groups. Oral summarizing, giving and receiving explanation, and elaborating (relating what is being learned to previous learning) are important types of verbal interchanges.

INDIVIDUAL ACCOUNTABILITY

Cooperative learning groups are not successful until every member has learned the material or has helped with and understood the assignment. It is important to stress and assess individual learning frequently, so that group members can appropriately support and help each other. Some ways of structuring individual accountability are by giving each group member an individual exam or by randomly selecting one member to give an answer for the entire group.

INTERPERSONAL AND SMALL GROUP SKILLS

Students do not come to school with the social skills they need to collaborate effectively with others. So teachers need to teach the appropriate communication, leadership, trust, decision making and conflict management skills, and provide the motivation to use these skills in order for groups to function effectively.

GROUP PROCESSING

Processing means giving students the time and procedures to analyse how well their groups are functioning and how well they are using the necessary social skills. This processing helps all group members achieve while maintaining effective working relationships among members. Feedback from the teacher and/or student observers on how well they observed the groups working may help processing effectiveness.

Taken from: Johnson, D.W., Johnson, R.T., and Halubee, E.J. (1986). *Circles of learning: Cooperation in the classroom.* Englewood Cliffs, N.J.: Prentice-Hall.

The teacher's role in cooperation

STEP 1. SELECT A LESSON

What about spelling? a page of story problems? editing a paragraph? comprehension questions? a science lab activity?

STEP 2. MAKE DECISIONS

Select the group size

This will vary according to the resources you need in the group, the skills of the students in working in groups, and the needs of the task. Experiment and find out what size works in your situation.

Assign students to groups

Heterogeneous groups have the potential for the most power. Differences among group members make the group function.

Arrange the classroom

Chairs and desks should be arranged in small cluster arrangements. Groups should be separated from each other as much as possible.

Provide the appropriate materials

Each group can have a set of materials or each group member can have different materials which relate to the task.

STEP 3. SET THE LESSON

State, in language your students understand:

- a clear and specific task statement,
- the group goal (positive-interdependence),
- the criteria for success as a group,
- specific behaviors expected, (i.e., everyone participating, staying in group, good listening skills).

STEP 4. MONITOR AND PROCESS

Be sure you always monitor. If appropriate, use other observers (students, other teachers) as well. Be sure to clarify:

- the way observers will know that a group member is showing an expected behavior,
- who will observe, and the observation form that will be used,
- the way data will be fed back to students.

STEP 5. INTERVENE TO SOLVE PROBLEMS AND TEACH SKILLS

There will be problems. Stop the students and teach them the skills you see them needing. Turn problems back to the group to solve; act as a consultant.

STEP 6. EVALUATE OUTCOMES

Each student gets the grade their group received. Remember you are evaluating how well they learned the material or accomplished the task and how well they helped each other. It is also a good idea to make notes about students of special interest, and to suggest ways to improve the lesson next time.

Taken from: Johnson, D.W. & Johnson, R.T. (1980). *Promoting Constructive Student-Student Relationships through Cooperative Learning*. Workshop material.

Cooperative Lesson Worksheet

Grade Level: ____________ Subject Area: ____________

Step 1. Select a Lesson: ____________________________

____

Step 2. Make Decisions.

a. Group size: ____________________________

b. Assignment to groups: ____________________________

____

c. Room arrangement: ____________________________

____

d. Materials needed for each group:

____

____

____

____

____

Step 3. Set the lesson. State, in language your students understand:

a. Task statement: ____________________________

____

____

b. Group goal: ____________________________

____

____

c. Criteria for success: ____________________________

____

d. Specific behaviors expected: ____________________________

____

____

Recommended materials

The following are materials recommended by Roger and David Johnson:

Books

Johnson, D.W. (1986). *Reaching out: Interpersonal effectiveness and self-actualization*, 3rd ed. Englewood Cliffs, NJ: Prentice-Hall.

Johnson, D.W., & Johnson, F. (1987). *Joining together: Group theory and group skills*, 3rd ed. Englewood Cliffs, NJ: Prentice-Hall.

Johnson, D.W., & Johnson, R. (1987). *Learning together and alone: Cooperative, competitive, and individualistic learning*, 2nd ed. Englewood Cliffs, NJ: Prentice-Hall.

Johnson, D.W., Johnson, R., & Halubee, E.J. (1986). *Circles of learning: Cooperation in the classroom*, Rev. Ed.: Edina, MN: Interaction Book Company.

Johnson, D.W., & Johnson, R. (1987). *Creative conflict*. Edina, MN: Interaction Book Company.

Teacher Materials

Johnson, D.W., Johnson, R.T., & Halubee, E.J. (Eds.) (1987). *Structuring cooperative learning: Lesson plans for teachers*. Edina, MN: Interaction Book Company.

Johnson, D.W., & Johnson, R.T. (1985). *Cooperative learning: Warm-ups, grouping strategies and group activities*. Edina. MN: Interaction Book Company.

Movies/Videotapes

Johnson, D.W., & Johnson, R.T. (Producers). 1987. *Circles of learning*. Edina, MN: Interaction Book Company.

Johnson, D.W., & Johnson, R.T. (Producers). 1980. *Belonging*. Edina, MN: Interaction Book Company.

Johnson, D.W., & Johnson, R.T. (Producers). 1977. *Controversy in the classroom*. Edina, MN: Interaction Book Company.

Peer tutoring

Tutoring is an old concept which has particular value for students with special needs. Working with a peer fosters inclusion and cooperation as well as producing academic gains.

There is a growing body of research on the instructional, social and cost-effective benefits of peer tutoring. Benefits have been shown for the tutor, student and the teacher.

BENEFITS

For the student

- individualisation
- additional time on academic tasks
- opportunities for practice and repetition
- peer support

For the tutors

- gains in academic knowledge
- gains in self-confidence
- concern for others

For the teacher

- fosters collaboration and cooperation in class
- produces improved academic and social outcomes.

Tutoring may be done within a class or across age groups with senior students helping younger students.

PLANNING IS ESSENTIAL

Consideration must be given to:

- Time and place
- Which students; how to select; how to train
- Selection of material
- Preparation of material
- Supervision of tutors
- Evaluation

TRAINING OF TUTORS IS ESSENTIAL

Topics to be addressed in training:

Information about the programme
Tutors' responsibilities
Teaching procedures
- How to present material
- How to support correct answers
- How to respond to errors

Measurement and recording procedures
Personal behaviour

The programme must be carefully monitored at first. It is a good idea for the tutors to meet together and discuss and review the programme. The teacher should take the role of facilitator at these meetings.

COMPONENTS OF A SUCCESSFUL PROGRAMME:

highly structured and carefully prescribed lesson format

objectives defined in terms of classroom curriculum

carefully selected content

duration and frequency of lessons carefully considered

active supervision by the teacher

daily measurement of student's progress

training in how to present material, how to applaud success and correct errors

This material has been adapted from an article by Alan Gartner and Dorothy Lipsky. If you want to find out more about peer-tutoring or read some of the major research you will find this article and its reference list very useful.

The Special Education Service will also be able to give you materials, suggestions and support should you wish to set up a peer-tutoring programme.

Reference:

Gartner, A. & Lipsky, D.K. (1990). "Students as Instructional Agents." In Stainback, W. & Stainback, S. (Eds.) *Support networks for inclusive schooling*. Baltimore, MD: Paul H. Brookes.

Adapting materials

There are a number of ways in which materials may be adapted:

1. Taping text

This is one of the simplest and most usual ways of modifying material. Many students are unable to read at the level of their text books. Their reading level may be several years behind what is needed for the text. Taping the text enables them to have access to the content information.

2. Highlighting text

This involves highlighting the main ideas and key vocabulary and concepts with a highlighter pen (or underlining them). It is also possible to delete the non-essentials with black felt pen. This assists students who have difficulty in isolating the key ideas.

3. Simplifying text

This involves photocopying the text and cutting, rearranging and pasting in such a way that the student can cope with the material. The main ideas can be presented sequentially in small sections on separate pages. Headings can be added in ways that will help the student to organise ideas.

4. Rewriting

This can be fairly time-consuming if there is a lot of material. The text should be rewritten in short, simple sentences, using basic words, with few syllables. If you use a word processor this greatly simplifies the task.

5. Providing study previews and guides

Study guides can be provided which

give summary outlines of the text
list questions to be answered
direct attention to the appropriate parts.

6. Developing worksheets

When a student has difficulty with written language and translating ideas on to paper, different forms of reporting back can be devised.

Worksheets can be developed which enable the student to tick multiple choice answers or fill in the blanks.

All these modifications require extra time. Some are more time consuming than others. However, these activities would be a legitimate use of discretionary resource time and could be requested on the basis of the requirement set out in the IEP.

It should also be noted that once these modifications are made the school has a permanent resource which can be used for a number of other students over a period of time.

Suggested interventions and strategies

The assessment information may indicate that the identified student has difficulties which require an individual approach.

The following are a number of strategies which the teacher can implement.

They are not recipes. They are samples only of the kind of adaptations that can be made to the programme.

They should not be applied in a haphazard manner but only after a clear definition of the problem has been made after a careful assessment.

As teachers try them out they should keep records and monitor how the student is responding.

They are adapted form *Hints for Success with Students with Learning Difficulties*, a publication of the Florida Diagnostic and Learning Resources System.

Student has difficulty getting started

☐ Give cue to begin

☐ Give work in smaller amounts

☐ Provide immediate feedback

☐ Sequence work with easier task first

☐ Provide all necessary materials

☐ Give clear directions

☐ Stand beside student as s/he begins

☐ Check on work often in first few minutes of task

☐ Give a checklist for each step of the task

☐ Get the assistance of a peer to help him/her start.

Student has difficulty staying on task and/or completing task

☐ provide a quiet area to which the student can retreat

☐ teach the student to plan ahead and anticipate consequences; step-by-step approach to achievement of long term and short term goals

☐ avoid large amounts of desk work

☐ structure the lesson so that students can master the material within the period of time that is compatible to their attention span

☐ reinforce appropriate behaviour

☐ give clear directions so students know exactly what is expected of them

☐ reduce amount to be accomplished, then gradually lengthen assignment and increase success criteria.

☐ provide time cues; reinforce work completed within a certain time frame (use a timer device)

☐ provide an enjoyed activity following completion of the task.

Student has difficulty controlling compulsive behaviour

☐ teach students that alternative responses are possible. Students must learn to monitor and evaluate responses

☐ provide firm rules, consistently adhered to with consequences clearly understood

☐ provide structured routines

☐ have students rehearse responses to situations before acting

☐ provide feedback so students come to recognise the correct responses

☐ gradually require longer waiting periods prior to getting what is wanted

Student has difficulty working in group situations

- ☐ provide a peer tutor
- ☐ reinforce any approximation to desired social behaviours (sitting with a group, nonverbal indication or participation/ smile, glance etc.)
- ☐ provide student with responsibility or position of leadership
- ☐ provide direct instruction in group processes and how to work in groups
- ☐ prepare the other group members to include and help the student.

Student has difficulty with comprehension of reading assignments

- ☐ assess reading level and provide appropriate materials
- ☐ adapt the text by highlighting and reorganising the material
- ☐ pre-teach content vocabulary
- ☐ tape the material to be read
- ☐ shorten the amount of material allow extra time
- ☐ provide content in another medium film strip, video, slides
- ☐ use a peer tutor
- ☐ give study guides which identify key ideas and terms
- ☐ motivate, consider interest level and relevancy of required reading
- ☐ provide discussion before and after reading as a frame of reference for new concepts
- ☐ have the student paraphrase orally what has been read.

Student has difficulty writing legibly

☐ provide extra time

☐ use graph paper to help spacing

☐ have students practice reading their own writing

☐ teach writing directly

☐ provide examples of correctly formed letters

☐ go over the student's work and analyse correct letters and mistakes together

☐ have student work on one or two particular aspects at a time e.g. ensuring all letters touch the line

☐ make sure student is using correct posture, paper position, grip on pen

Student has difficulty with written expression

☐ provide lots of opportunities for oral expression

☐ accept alternate forms of reporting ideas

☐ have the student dictate his/her work to someone else and copy it

☐ allow more time

☐ provide models of finished products

☐ accept less volume of work at first

Student has difficulty following directions

- ☐ give clear directions
- ☐ use as few words as possible
- ☐ repeat directions
- ☐ have student repeat
- ☐ provide a written checklist
- ☐ write directions on board as well as giving them orally
- ☐ provide a peer tutor
- ☐ monitor closely as student begins

Negotiation

MODULE 8

NEGOTIATION

This Module

- Proposes principled negotiation
- Talks about compromise, majority and consensus decisions

Also outlines

- A collaborative problem solving model
- Guidelines for group members and facilitators of problem solving groups
- A check you can apply to your negotiation outcomes

Negotiating

Negotiating is not an activity reserved for experts.

Most people negotiate almost every day. Parents of teenage children probably negotiate more than most people. We negotiate with our partners about who does what chores. We negotiate with our colleagues at work over who does playground supervision. We negotiate with shop assistants when we return faulty goods.

The IEP process may require some negotiation. At the IEP meeting a number of people interested in the welfare of a student come together to work out the most effective programme for that student.

They may not all agree on what the most effective programme will be; they may differ in what the goals should be or what the priority objectives are. No group of people is going to be in agreement all of the time.

Negotiation is a process of trying to get what you want, while ensuring that the rights of others are recognised.

In the IEP process what must take place is

PRINCIPLED NEGOTIATION

This implies that:

You obtain what you are entitled to but still **stay decent**

You are **fair** but **no-one takes advantage** of that fairness.

The **golden rule** in principled negotiating is:

Everyone wins

In the IEP meeting everyone must win otherwise the student will be the loser.

This idea that everyone wins in successful negotiating is not being put forward on purely ethical and moral grounds.

It does in fact make good sense.

When everyone feels good about an outcome and has a stake in its implementation, the likelihood that it will be achieved successfully is greatly increased.

An "everyone wins" solution is much more likely to ensure that long-term goals are achieved rather than short term advantages obtained.

Everyone should leave a negotiation with their self-respect intact.

Mutually satisfying decisions

There are a number of ways in which a decision can be reached:

COMPROMISE

By definition *compromise* means that no-one gets what they really want.

In a compromise decision both sides lay their positions on the table and stand by them. When no-one is willing to move, a point between the positions is decided on. The result usually is that deadlock is averted but no-one is really satisfied.

When compromise is the usual negotiating style, the parties are inclined to take up extreme positions with extraordinary demands knowing that concessions will have to be made.

Since neither side gets what they really want neither side is strongly committed to support the solution.

Compromise will not necessarily result in the successful resolution of conflict and may well lead to tactical game-playing.

Compromise is not **always** a poor choice however. On occasion it may be the only solution that is acceptable.

However, in general, you should always strive for a solution that is mutually satisfying.

MAJORITY DECISION

This is a familiar and popular method of making decisions in our culture. Our parliamentary system is based on this method.

It is not a method of choice, however, in IEP meetings. It is inclined to be used when time is running short and means that the outvoted minority is unable to influence the decision.

When a task requires the support of everyone in the group there is a risk that the outcome will be sabotaged by those whose needs have been over-ruled.

This method is often favoured because it is speedy and can disguise conflict and keep it from being brought out into the open.

CONSENSUS

Consensus is difficult, sometimes impossible, to reach. Complete unanimity is not always the goal and anyway is rarely achieved. A consensus decision means that each individual is able to accept and live with the decision of the group.

All participants contribute their ideas, thoughts and feelings. They all share in the final decision making. Everyone has a chance to comment on the issue and say how they feel about it. Those who are not entirely in agreement are willing to express publicly a willingness to "give it a try".

Consensus can be time consuming and requires the group to have good leadership and a willingness to bring conflict out into the open and deal with it.

Consensus decision making usually results in more innovative solutions as everyone has had the opportunity to participate and have their ideas heard.

Consensus is the method of choice in the IEP process.

Collaborative problem solving

Everyone involved in an IEP meeting is there because they have an interest in the welfare of the student. It is likely that they will form a group which will be required to work together over a long period of time. An IEP group has a common goal - achieving what is best for the learner.

For the IEP team

Negotiation is not a contest of wills or a game to be won

Negotiation is a process of collaborative problem solving

Groups consisting of 4 - 8 people can produce more ideas than individuals working on their own. In a group situation, people can "feed off" each other's ideas and produce more creative and higher quality solutions.

However there may be certain barriers to effective group problem solving. Some people may hold back their ideas for fear of ridicule or criticism. High status members of the group may, intentionally or unintentionally, dominate and overawe the other members.

The following is a procedure for helping teams, such as an IEP team, solve problems which may arise and negotiate solutions that are acceptable to everyone.

It is just one of many possible ways of approaching problem situations.

The underlying aims in problem solving are:

To broaden the options
To search for mutual gains

A PROCEDURE FOR PROBLEM SOLVING

This procedure involves seven stages:

- Identify the problem
- Analyse the problem
- Brainstorm possible solutions
- Identify and examine the most promising ideas
- Draw up a plan of action
- Check whether it meets the needs of all parties
- Take action

1. Identify the problem

Clearly state the situation as your see it now and what you would like the situation to be. Be specific and as precise as possible. Check out the perceptions and understandings of everyone in the group. Define the problem in terms of needs and not solutions or positions. It is worth taking time over this stage. Defining the problem can help to clarify the issues.

2. Analyse the problem

List all the factors that are preventing you from reaching your goal. List all the factors that might help you reach your goal. Mark those that you are not in a position to change.

3. Brainstorm possible solutions

Let your imagination go. Try to come up with as long a list of ideas as possible.

Examine all the factors that are hindering you and attempt to find ways to eliminate or work around those factors.

List **all** the solutions however far-out or outlandish. Even if an idea appears ridiculous on the surface it may help to "trigger" in someone else's mind an idea that is more workable.

Record the ideas on a blackboard or on sheet of newsprint.

The underlying notion in brainstorming is that all ideas are accepted uncritically at this stage in the procedure. No clarification is given. Just write the ideas up. Clarification comes later.

Ground rules :

All ideas are accepted without critical comment

Ideas are not attributed to any member of the group. They are written up with no acknowledgment of the source.

At this stage it is essential that there is no evaluation of the ideas. This takes place in the next stage. What is of interest here is the generation of as many ideas as possible in an atmosphere where everyone feels free to contribute without having to "own" any of the ideas.

4. Identify and examine the most promising ideas

Mark those ideas that the group think are most promising. At this stage, critical comment is acceptable provided the comments are phrased in positive and constructive ways. **Remember no decisions** are being made yet. Ideas are merely being marked for further discussion.

Examine the most promising ideas and discuss how they might be improved.

Discuss carefully what the possible consequences of each suggestion might be.

5. Draw up a plan of action

Choose a solution. You may decide to try more than one of the solutions.

Draw up a specific and detailed plan of action. Be sure that anyone who will be required to implement the plan has been consulted and is in agreement.

Anticipate any problems or barriers that might arise. Imagine and discuss anything that might get in the way of the plan. Revise if necessary.

6. Check whether it meets the needs of all parties

This is a critical stage in the procedure. It is essential that this is explicitly checked. Everyone in the group must be given the chance to comment on the agreed upon solution and state publicly that they will support it. They may have reservations which they should be encouraged to express, but a commitment must be obtained from every member in the group to 'give it a try'.

7. Take action

Put the plan into action. Decide on an evaluation date and criteria for success. Be prepared to trouble-shoot the plan and change in the light of what you learn as you go along. Remember that problem solving is an ongoing "try-it-and-see" process.

Advantages of the problem solving procedure

- It directs thinking away from the notion that there is a single solution which must be searched out, found and implemented.
- It separates the generation of ideas from the judging of these ideas. This encourages members to contribute without feeling threatened.
- Because all the ideas go into a 'pool' without comment no one 'owns' the ideas and it is easier to evaluate them objectively when the person who proposed them does not feel the need to defend them.
- It focuses attention on the issues.
- It helps to broaden the options by encouraging group members to come up with creative and innovative solutions.
- Everyone has an opportunity to evaluate the solutions in terms of their needs. This encourages the notion that in negotiating we must seek out solutions where there are mutual gains - where **everyone wins.**

Successful collaborative negotiation lies in finding out what the other side really want and showing them a way to get it while you get what you want.

(Cohen)

Guidelines for group members for achieving consensus

- ✓ In the initial definition and analysis of the problem, clearly present your *needs*, rather than your position. Avoid using emotive or judgmental language.

- ✓ Listen carefully to the views of the other members of the group. Listen to and evaluate as objectively as possible their reactions to your point of view.

- ✓ In the brainstorming session avoid arguing for the suggestions and ideas you make. State them clearly and leave it at that.

- ✓ If there is stalemate, do not see it as a "win-lose" situation. Look for an alternative that is acceptable to you and the other members of the group.

- ✓ Do not change your mind simply to avoid conflict and to reach agreement and harmony. Change your mind only on the basis of reasoned, objective argument.

- ✓ Avoid "simple" solutions such as a majority vote or tossing a coin. These only appear to be effective, and are unlikely to be long lasting.

- ✓ Be wary of solutions reached too glibly or quickly. Question whether everyone has really accepted the solution.

- ✓ Do not avoid differences of opinion. They can be used constructively. It is easier to deal with stated views than views that are strongly held but are not expressed. Differences of opinion should be aired, not glossed over or hidden.

- ✓ Be mindful of the feelings of others. Treat everyone's opinions with respect even if you do not agree with them.

Guidelines for facilitators of problem-solving groups

- Ensure that the group takes time to define and analyse the problem carefully. This is an activity which is frequently missed out. People are inclined to move straight to solution generation. Ensure that everyone understands and is in agreement on what the problem is.
- Conflict and disagreement are not undesirable. They can be valuable elements in creating effective solutions. The facilitator should model and encourage respect for the expression of differing views.
- Discourage all critical and evaluative comments during the brainstorming phase of the procedure. It is essential that group members are encouraged to put forward their views in a totally accepting atmosphere.
- Write up **all** solutions as they are generated.
- Keep checking on the feelings, perceptions and understandings of the group. Do not move on to the next stage in the procedure without checking out with all group members that they are ready to do so.
- Keep checking that you remain in a facilitator role. It is easy to slip into a leadership role and perhaps control the process or dominate the ideas more than you intend.

Was the negotiation successful?

The success of a negotiation should be judged by the following criteria:

- did it produce a fair agreement?
- was it efficient?
- did it improve (or at least not damage) relationships?

Communication

MODULE 9

Massey University

COMMUNICATION

This Module

- Says why communication is important for the IEP process
- Outlines some ways of improving communication
- Suggests way of communicating with parents

Communication

To be effective an IEP team must establish:

Trust

Good Communication

Good Relationships

They are all interconnected. Improve one and you will automatically improve the other two.

TRUST is an important element in communication. It is the key to enhanced communication. If the IEP team is to work successfully then trust must be built up. Trust is an elusive quality to define but basically it means that you know that the other person will not take unfair advantage of you. It is a fragile thing built up very slowly over time but able to be destroyed very quickly with one action. It is often based on actions rather than words but good, open, honest communication will greatly enhance its establishment.

RELATIONSHIPS AND COMMUNICATION are interdependent. Setting up patterns of clear, honest communication will improve relationships, and good relationships will enhance communication. Communication skills should always be viewed in the context of a relationship.

Communication is a very broad topic - one worthy of a whole training manual. In this module we will concentrate mainly on developing some of the skills which will help to reduce a major cause of dissent, difficulty and conflict in groups - miscommunication.

Miscommunication is the discrepancy between what you intended to say and what the other person thought you said.

There are a number of well tried, clearly defined skills that will reduce the possibility of miscommunication occurring. These skills are not new or revolutionary nor are they of any use if they are not based on a genuine desire to understand the other person and help them to understand you. Without this desire for mutual understanding the skills become merely tricks and gimmicks and are unlikely to be successful.

They are deceptive in their simplicity. Like all skills they must be practised to be perfected and as usually happens when we first attempt a new skill we are likely to feel awkward and uncomfortable. No-one skis down a mountain comfortably at the first try! The pay-off however warrants perseverance.

The skills we will discuss are:

- Checking your perceptions of what the other person means.
- Checking your perceptions of what the other person feels.
- Describing your own feelings.
- Describing the other person's behaviour.

The first two of these skills are sometimes referred to as active listening skills.

Developing these skills will greatly enhance the clarity of communication.

Improving clarity of communications

CHECKING PERCEPTIONS OF MEANING

This is sometimes called paraphrasing.

This is a way of making sure you understand what the other person intended to say.

It consists of feeding back to the person your understanding of his/her message. You provide information to the other person so s/he can decide whether you have understood what s/he meant to say.

How you do it is a matter of your personal preference and style. It is **not**, however, just repeating back what the person has said.

EXAMPLE

Teacher: "I don't think we should apply for teacher aide for Katy for next term."

Parent: "Are you saying that she doesn't need some one to one help any more?"

Teacher: "No, she certainly will still benefit from some one to one, but I am setting up a peer-tutoring programme and I think it is much better that she gets the help in the same way as the other students do. She isn't being singled out and I feel that is very important at her age."

Useful phrases are:

"Are you saying that ....?"

"As I understand what you are saying ....?"

"Do you mean that ....?"

Can I check that I have got this right...........................?"

Is this an accurate understanding of your idea................?"

Paraphrasing is usually helpful when messages are not simple ones. If the message is a simple one, then it is quite acceptable to use phrases such as "Tell me more", "What do you mean?" "Could you explain?". But as a general rule and certainly with complex messages it is better to paraphrase, that is, to give your understanding, as this allows the sender of the message to assess what has been understood and if it has been misunderstood s/he is able to provide useful information to clarify his/her message.

It also communicates to him/her that you are interested in what s/he has to say and have made some effort to understand him/her message.

You do not need to paraphrase everything that is said. That would be tedious and artificial. Rather, paraphrasing can be used as a means of checking things out either when you are puzzled or at the end of a section of a meeting when clarity is important.

Use paraphrasing as a tool. Be aware that miscommunications can and do occur. Remember that you have a good method of checking out messages. Practise paraphrasing from time to time with a colleague as you discuss your programmes or at staff meetings when you want to be sure you have got a message clear. Share the idea with a colleague and ask them to check you out from time to time so that you keep developing your skills.

CHECKING FOR FEELINGS

This skill complements paraphrasing. Where paraphrasing focussed on the meaning of the message this focusses on the feelings of the sender of the message.

This skill involves describing your perceptions of the other person's feelings.

It should be done tentatively and sensitively, without interpretations or attempts to explain the feelings, and without any expressions of approval or disapproval.

It is a difficult task as feelings are rarely expressed openly. We usually have to rely on non-verbal cues and these can be open to wide interpretation. For example, if a person blushes s/he may be angry, or embarrassed or just uncomfortably hot in a stuffy room!

EXAMPLES

"I get the impression you may be disappointed at the assessment results"

"You look rapt at the progress he has made"

"You seem unsure about which class you would like him to be in"

Using this approach is only helpful if it is genuine. It is particularly unhelpful if it is used in a manipulative manner. People can react very strongly to someone describing their feelings, especially if it means they are made to feel uncomfortable, guilty or "put down".

When this approach is used carefully and with genuine concern for others it shows the other person that you take an interest in them. It is evidence of the fact that you listened carefully and you are now trying to clarify how to deal with an important issue.

The expression of dissatisfaction or hostile feelings can be an indication that there has been faulty communication. This points to a need for issues to be dealt with openly and honestly. An honest statement of feeling provides an excellent basis for facing the issue and problem solving.

Telling people we are pleased with what they have done or otherwise stating positive feelings towards the members of the group can have a cohesive effect on the group.

REMEMBER, DO NOT use this skill in a manipulative, coercive way to get people to alter their behaviour merely so that you will not feel as you do.

DESCRIBING BEHAVIOUR

This skill involves describing specific, observable behaviours without evaluating them or attributing motives.

Instead of describing behaviour we are inclined to describe personality traits, attitudes or motives. In so doing we are inclined to reveal more about our own feelings than the behaviour of the other person.

For example people may say to someone: "You are rude". This is likely immediately to put them on the defensive as they have been attacked as a person. They may have had no intention of being rude and are totally unaware of what they did to bring on this reaction. The behaviour in question may have been their failure to introduce the members of their group. If someone had remarked, "You didn't introduce the new member of the group to everyone," the person can take steps to remedy the situation without feeling threatened or attacked.

"You are stubborn about this" might be another example when a person has disagreed with every alternative solution put forward.

Clearly even accurate descriptions could be pretty blunt statements. It is often a good idea to use description of behaviour along with one of the other skills, such as paraphrasing or expressions of feeling.

EXAMPLE 1

Instead of saying "You keep rabbiting on about that".

Say "That is the third time you have brought that subject up. Do you believe it should be an item on the agenda for more detailed discussion."

The behaviour has been accurately described but without judgment or the use of a "put-down". Then, added to the description, we have a paraphrase - an attempt to get an understanding of the person's message.

Used in this way, the accurate description is both helpful and facilitates progress.

EXAMPLE 2

Instead of saying "You really are very rude"

Say "You have interrupted me twice. I am feeling frustrated that I can't get my points expressed."

You have described the behaviour and said clearly how it affects you. You open yourself up a little but you allow the other person to get some insight into the effects of their behaviour without your being confrontational or provocative.

This is a valuable skill for helping to clarify communication. Each member of the group becomes more aware of the impact they have on the group and a better understanding of the effects of their behaviour on the members of the group.

DESCRIBING YOUR OWN FEELINGS

Here you specify or identify what you are feeling as explicitly as you can.

There is a difference between **describing** feelings and **expressing** them. We frequently express our feelings but rarely describe them. When we express them they are open to wide variations in interpretation as others must try to infer our emotional state from various cues. These cues can be quite complex. By describing your feelings the chances of misinterpretation are greatly reduced.

EXAMPLES

"I feel quite angry over the loss of the resources"
"I was so pleased at the cooperation we got"
"I am totally confused about what I am expected to do"
"I am disappointed that the agreed programme was not implemented"

This can actually be quite a difficult skill to master as we live in a culture where feelings, as a general rule, are not freely stated.

The above four skills are methods of giving and receiving feedback. Follow these guidelines and see how it works for you.

- Do not use feedback as a manipulative device to get people to do as you would like.
- Give feedback about behaviour, not physical or personal attributes.
- Give it as close in time to the event as possible.
- Stick to the facts. Avoid interpretations.
- Consider the feelings of the other person.

How to communicate information about a student

GUIDELINES FOR TEACHERS

Many teachers report that it can be difficult to communicate information to parents when that information may cause them concern and perhaps result in denial, defensiveness or an otherwise negative response from the parents.

The following suggestions may help teachers in this situation towards clear, unambiguous communication, while at the same time ensuring that the parents are not left feeling angry, guilty or in despair.

Information about students must be be:

- Honest
- Clear and free of jargon
- Non-judgmental
- Backed up by data

Honest

Teachers have a professional responsibility to make sure that the information they give is accurate and honestly reflects the reality of the student's position.

Phrases such as "working at his own level" when that may be 3 or 4 years behind the rest of the class do not accurately reflect the needs of the student. Information is sometimes phrased in vague ways because the teacher does not want to be unduly negative.

Accuracy can be masked by vague and woolly phrases which are not intentionally designed to deceive but in the end have that effect.

Clear and jargon-free

Jargon has its legitimate uses. It can assist communication between those individuals and groups who are familiar with it.

However, most parents are unfamiliar with much of the jargon used by professionals and it is up to teachers to ensure that communications to parents, whether oral or written, are phrased in language that can be understood by them.

This is not always easy to achieve as some of the terms are so familiar and automatic that professionals are not always aware they are using jargon. Other terms have very specific meanings for which there is no lay term. Nevertheless it is important to find the words which will convey the meaning to parents in words they understand.

Non-judgmental

We are often unaware of our biases and the value judgments we make. Recent research has shown, for example, that teachers are subject to gender bias and efforts are being made to make all teachers more aware of this.

Teachers are sometimes unaware that they are placing their own values on the behaviour of the student. A value judgment of the student is what is sometimes communicated to the parent rather than a value-free description of the behaviour.

As a general rule if one describes the *behaviour* of the student rather than describing a *characteristic* of the student one is more likely to be non-judgmental. Here are some examples.

Value judgment	**Behaviour**
Lazy	Can do more when he is better motivated
Uncooperative	Does not work well with a group
Cheat	Uses other people's work to get his answers
Sloppy	Turns in work that is not up to the required standard of neatness
Loner	Works by himself, does not seek the company of others
Emotionally disturbed	Is prone to angry outbursts for apparently trivial reasons.

When one describes the behaviour rather than the characteristic or "personality trait" of the student, one has immediately framed the situation up in a more positive way. Most behaviours can be changed. The focus is therefore placed on what can be done to help the student change the behaviour rather than communicating to the parent that there is something "wrong" or "deficient" with their child.

Some of these examples merely show an acceptable alternative for a term which most would agree is unacceptable when used by a professional. In the case of "emotionally disturbed", we have a term which has many different possible meanings, any one of which could be taken by the parent to be offensive. Furthermore, none of them may be the meaning the teacher wished to convey.

Check the adjectives you are using. Are they judgmental? Is there a better way of saying what you are trying to convey?

Backed up by data

It is a professional truism that any report on, or decisions made about a student must be based on data which has been carefully and systematically collected.

Teacher impressions are not enough.

If, as has been suggested above, the teacher concentrates on reporting the *behaviour* of the student rather than a *trait* or *characteristic* then it is clearer how she should start going about collecting information. It is easier to collect data on student behaviour, either academic or social, than it is to be able to back up judgments on "personality" characteristics of the student. "Personality traits" are very difficult to measure in valid and reliable ways.

If the teacher reports to the parents that the student does not turn in work to an appropriate standard of neatness then the teacher should bring along to the interview samples of the student's work and samples of the average level of neatness in the class.

If the student has academic difficulties then any statements should be backed up by test results and work samples.

If the student has behavioural difficulties then information from the guidance and support network should be available or the results of systematic observations made by the teacher and other staff.

It is reasonable for a parent to expect the teacher to back up with data any statement made about their child.

General

The general "tone" of the interview is extremely important.

School staff should always have an intention to problem-solve possible solutions with parents. The whole underlying intention of the meeting should be "We believe we have a problem here. What can we do about it?"

Remember a problem will remain just that, unless it is redefined as a challenge to teacher *and* parent to find a solution.

Parents should be able to leave the meeting aware of what the problem is, what the school is going to do about it and what their responsibilities will be.

They should not be left feeling that they are to blame for the problem nor that the solution lies entirely with them.

Merely to make them aware of a problem without offering positive solutions is likely to leave the parents feeling a mixture of despair and anger.

A problem-solving approach helps to generate honest, direct communication. It enables teacher and parents to identify the behaviours that need to be changed. It ensures that the challenge of changing those behaviours in positive ways can be taken up.

Ensure also that the student's strengths are discussed so that the meeting does not concentrate entirely on the negative aspects which are causing concern.

A Guide for Parents

Massey University

Individual Educational Plans (IEPs)

A Guide for Parents

(Permission is granted to
photocopy this Guide)

Massey University

IEPs - Individual Educational Plans

WHAT ARE THEY?

An IEP is a written plan for a student who has special needs that cannot be met by the typical classroom programme.

It sets out:

- what your child is able to do
- important goals for your child
- steps to reach the goals
- ways of helping your child reach the goals
- any equipment or support needed
- how progress will be measured
- when progress will be reviewed.

As a parent you have the right to be involved in planning for your child

Preparing an IEP is a team effort

You are an important member of that team

Membership of the team will vary depending on the needs of the child. Your child's teacher will, of course be a member and any person who works with your child may be on the team. This could be:

- the principal or a senior teacher
- speech language therapist
- psychologist
- physiotherapist
- teacher aide.

You, as a parent, have a right to say who will be on the team. You can take a friend along with you for support if you wish.

Either you or the school may initiate the IEP process

How can the IEP help you to help your child?

THE IEP:

- provides an opportunity for you to share information with the professionals closely concerned with your child
- enables you to be involved in setting goals for your child
- provides an opportunity for you to request assistance, resources, support and services
- enables you to outline how you might be able to work in with the school to help your child
- clarifies responsibilities
- enables you to monitor your child's progress and whether s/he is receiving the appropriate programming and support.

WHAT DO YOU HAVE TO DO?

If you are involved in the IEP process you will:

- gather information about your child that will help the team to plan the programme
- attend the IEP meeting
- perhaps help with the programme, if you are able to
- attend subsequent meetings to monitor progress and set new goals.

Hints to help you

These are only suggestions. They are not things you must do. They are only given as ideas for you to consider when you are involved in an IEP.

BEFORE THE MEETING

- Talk with other parents who have been involved with IEPs, to learn about their experiences.
- Think about whether you want your child to be involved and discuss this with the school.
- Whether your child is going to be involved in the meeting or not, discuss it with your child. Find out how things are going for them at school. Find out what is important to them. Find out what they like or dislike. Ask if there is something they would like to be able to do better.
- Review your child's records. You have a right to see any reports and records on your child. Ask to get any necessary reports before the meeting.
- Jot down any questions you want to ask. List your main concerns about your child. List all the good things that are happening for them.
- Gather together information about your child to share at the meeting such as things done well, activities s/he likes doing, topics of interest, things that are difficult to do.
- Consider what goals you think are important for your child. Be prepared to discuss what you think your child needs and what sort of progress you would like to see over the next year.
- Ask the school for a list of people they suggest should attend the meeting. If there is anyone you would like present who is not already on the list, ensure that an invitation is issued to them.
- Check that the meeting place and the time of the conference is suitable to you. If not, ask that the meeting be changed to a time and place that suits you.

DURING THE MEETING

- Know who everyone is and what they do. **Ask** if you don't.
- Ensure that people discuss what your child **can** do not only the things they can't do
- Take time to cover all the things on your list
- If you disagree with what is being said **say so**
- **Ask** for an explanation of any terms or words you do not understand
- Make sure you are clear about what has been agreed to:
  - what you have to do
  - what others have to do
  - what resources are necessary
- Make sure that you have had your say and you agree with what is being decided for your child
- Make sure that the date of the next meeting is set.

AFTER THE MEETING

- You should receive a copy of the IEP within a few days of the meeting. Phone the school and ask for one if it does not arrive
- Check that the written plan says:
  - who does what
  - when
  - where
  - what resources are needed
  - what your child will be able to do
  - the review date
  - how progress will be measured.
- At the next meeting make sure that everyone has done what they said they would. Check to see whether your child has reached the objectives.

Remember: the IEP is a team effort. If you are unsure about anything - ask. The other members of the team are there because they have an interest in your child. Team members are there to give each other mutual support in helping your child.

If you want to find out more about IEPs contact your school. They will give you more information. Ask to borrow *The Individual Education Plan: An Overview.*

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Draft Review of Special Education Agreement SES/Ministry Perris Task Force.

APPENDICES

Special Education Service

He Tohu Ūmanga Mātauranga

The restructuring of the administration of education has resulted in a new look in special education. The Ministry of Education provides resources to meet special needs. Most special education teaching support staff are employed by their own boards of trustees. A new organisation, the Special Education Service, provides the advice, guidance, and specialist support to back up teachers, parents, and others providing services to children and young people with special educational and developmental needs.

The service has a strong local emphasis, centred in 12 district offices and in numerous local offices and school locations. It is continuing to develop high quality services that are part of regular education. In particular, responsiveness to the needs of Maori and Pacific Islands communities is being emphasised.

The range of services is extensive: early childhood special teaching, and advisory services, advisory services on the deaf, home liaison and support services (especially through visiting teachers), speech language therapy, and psychological support and advisory services.

Under its agreement with the ministry the SES provides services in five main areas:

services to individuals and families,
training courses,
support to service providers,
advice to the Ministry of Education,
action plans.

The service may also contract with other government and non-government agencies and groups to provide services that are within staff areas of professional expertise (e.g. counselling, training, staff development, therapies).

The Special Education Service has a board of seven members which is appointed by, and reports to, the Minister of Education. It has the responsibility for the policy and direction of SES. The board members are:

Anne Meade, Wellington (Chairperson);
Mason Durie, Palmerston North;
Karen Erenstrom, Wellington;
Russell Kerse, Wellington;
David Mitchell, Hamilton;
Ruth Moorhouse, Christchurch and Wellington;
Ross Wilson, Wellington (General Manager).

We know that you will find the Special Education Service relevant to regular education; that is where it belongs.

Kia ora koutou.

Ross Wilson

Anne Meade
Chairperson

Ross Wilson
General Manager

Ross Wilson, Maris O'Rourke (Chief Executive Officer of Ministry of Education) and Anne Meade signing the agreement between the Ministry of Education and the Special Education Service Board.

BEST COPY AVAILABLE

The Special Education Service Provides the Ministry of Education with the Following Services:
(From Agreement with the Ministry)

A. *Service to Individuals and Families*

1. Ensure that for each learner on the roll of an attached unit or teacher or for whom an extra resource or programme change is required, a written programme plan is developed which is:
    - — based on up to date assessment data gathered in the normal environments of the learner as far as possible by those in day to day contact with the learner;
    - — devised in consultation with those regularly involved with the care and education of the learner;
    - — containing specific objectives for the learner;
    - — detailing teaching strategies and resource deployment to achieve these objectives;
    - — detailing objective evaluation procedures.

    Any direct teaching or therapy supplied to the learner will follow on from the development of a plan as specified in (1) above.
2. Co-operate with learners, caregivers, institutions, associated agencies and district ministry liaison officers, in evaluations of the effectiveness of SES delivery of outputs.
3. Provide or facilitate the provision of advice to caregivers on:
    - — the management of their child;
    - — advocacy for their child within the system.
4. Act as a child advocate when required.
5. Involve caregivers and learners in the process of making educational decisions themselves as appropriate.
6. Inform caregivers/whanau about:
    - — the way the education system works;
    - — advocacy/consultee skills.

B. *Training Courses*

For each of the outputs (1–3) below:
- — Write plans for SES district managers' approval to include outcome statements;
- — Negotiate with course members and their employing bodies to set individual objectives and evaluate the extent to which they are met.

1. Participate in the in-service training of regular educators in learning institutions in effective and culturally sensitive methods to enable them to:
    - — facilitate effective mainstreaming of learners with special teaching needs;
    - — organise a systems management approach to meeting special educational needs;
    - — identify needs;
    - — provide programming;
    - — evaluate the effectiveness of the programmes.
2. Participate in the in-service training of special educators to:
    - — facilitate effective mainstreaming of learners with special teaching needs;
    - — promote effective partnerships with caregivers and regular educators;
    - — use programme strategies and skills which are research based.
3. Participate in training ancillary staff in working effectively with teachers to meet the special needs of identified learners.

C. *Support to Service Providers*

1. Participate as full members of management committees of all attached special education units, attached teachers and support teams.
2. Attend all Advisory and Admissions Committee meetings at residential and day special schools and negotiate for any additional service delivery.
3. Negotiate a mode and level of service delivery with learning institutions and facilities that is compatible with ministry objectives.
4. Promote the concept of special needs committees in learning institutions, and foster their continuing development.
5. Provide relevant information to caregivers and teachers.
6. Co-operate in the provision of an independent second opinion within the SES.
7. Respond promptly to requests from facilities/caregivers for support for applications for discretionary resources, for example, transport, teacher aide hours, equipment.
8. Respond to requests for information/skill training by groups associated with the education and welfare of learners, for example, Plunket nurses, boards of trustees, etc.
9. Implement the policy of the Education Co-ordinating Committee in respect to Itinerant Liaison Teachers (Special Needs).

D. *Advice to Ministry*

1. Respond within agreed time limits to all pertinent requests for information from the ministry including material required for ministerials and parliamentary questions addressed to the ministry.
2. Advise the ministry at agreed intervals on resource allocation—human, buildings, equipment, transport, and finance.
3. Advise at agreed intervals on the most effective deployment of itinerant personnel, and personnel in special education units and facilities.
4. Respond to requests from the Research and Statistics Division of the ministry for comments on the value of research proposals which affect the education of learners with special needs.
5. Report annually on the progress of the implementation of mainstreaming policies.
6. Advise the ministry annually on the extent, means and effectiveness with which the outputs of the board have been achieved.
7. Advise the ministry of the cost of the inputs needed to achieve the outputs by annual report.
8. Advise the ministry of any matter including funding affecting the ability of the board to comply with the conditions or required outputs of this agreement.
9. Advise the ministry on relevant research questions and new proposed policy initiatives.
10. When produced furnish a copy of the board's corporate plan to the ministry.

11. Advise the ministry on the suitability of applicants for training as:
    - Advisers on deaf children
    - Other courses where there is a mutual agreement that SES should comment.
12. Report to the ministry on the board's ongoing staffing requirements in respect of this training e.g.: quotas, acceptability, course content, practical experience.

E. Action Plans

Treaty of Waitangi

1. Provide by 30 June 1990 a plan which indicates strategies to be used to ensure that the principles of the Treaty of Waitangi are being upheld. The plan will include performance indicators.

Equal Employment Opportunities

2. Provide by 30 June 1990 a plan which indicates strategies to be used to ensure the rights of women and ethnic minority groups are upheld. The plan will include performance indicators.

Professional Development

3. Provide by 30 June 1990 a plan that will:
    - ensure that the staff who work across sectors are competent to do so;
    - ensure knowledge of the principles of the Treaty of Waitangi and their implications for the work of the SES;
    - ensure understanding of gender issues; and
    - ensure that the principles and practices which facilitate mainstreaming are understood and can be implemented by all SES staff.
4. By June 1990 develop performance indicators to assist the Special Education Service in determining the effectiveness of the services it offers.
5. Negotiate towards the development of joint district service plans with other service providers, e.g.: Area Health Boards, IHC, CCS, Iwi Authorities, DSW District Offices, ECDU District Offices to ensure co-ordinated service delivery. This process will begin by co-ordinating services in the early childhood sector. Such an inter-agency plan must give full recognition to the funding available from the other agencies participating in this service plan.
6. Progressively adjust the level of servicing in the early childhood sector with a minimum level of 25 percent of service time in each district.

Locations of National and District Offices of the Special Education Service

Postal Address	Location	Phone/Fax Numbers
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Frank Stacey District Manager—Auckland Special Education Service Box 28-341 Remuera Auckland	4 Ascot Avenue Remuera Auckland	Ph: (09) 520 3150 Fax: (09) 542 094
Christine [illegible]-Jones District Manager—Manukau Special Education Service Box 663 Manurewa	State Insurance Bldg 236 Great South Road Manurewa	Ph: (09) 266 3260 Fax: (09) 266 3135
John Mohi District Manager—Waikato Special Education Service Box 774 Hamilton	Cnr Anglesea & Collingwood Streets Hamilton	Ph: (071) 82 226 Fax: (071) 82 226
Lesley Dunn District Manager—BOP Special Education Service Box 1749 Rotorua	The Government Centre [illegible]pa Street Ro[illegible]	Ph: (073) 481 339 Fax: (073) 481 342

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Suzie O'Hagan District Manager—Hawke's Bay Special Education Service Box 953 Napier	Housing Corporation Building Hastings Street Napier	Ph: (070) 354 654 Fax: (070) 352 489
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A SUPPLEMENT TO THE EDUCATION GAZETTE, 2 JULY 1990

Summary of Special Education Task Force Report

▶ *Introduction*

On 11 June 1990 the Minister of Education released the report of the Special Education Task Force. The group met between March and May with the primary purpose of considering how special education was currently provided for and resourced, and what changes were necessary.

Members of the group represented the Ministry of Education, the Special Education Service, NZEI and PPTA, the School Trustees' Association, Maori people and parents of children with disabilities. More than 250 written submissions were received and considered together with input from the members of the task force in order to formulate the recommendations.

One of the most striking aspects of the submissions was the very wide range of opinion on almost every issue. The group members were aware that there would not be universal agreement with their conclusions, but agreed that these were the most practicable in the current circumstances.

Some specialist terminology is used in the report. The task force used the following as definitions:

special education is any provision whether of extra adult assistance, adapted programmes or learning environments or specialised equipment or materials delivered to facilitate optimal learning for those with disabilities.

mainstreaming is an educational practice which means that all learners are taught on regular school sites. The degree of participation of learners in regular classes varies. Full mainstreaming is the inclusion of learners in regular classes for their entire school day.

An individual developmental/educational plan (IDP/IEP) is an educational plan designed to meet the specific current needs of a learner with special educational needs. It brings the learner, teacher, parents, and others closely involved together in a team of develop a meaningful plan for the identified learner, for a specified time period, in a particular setting.

▶ *Current Situation*

The change from control by the regional offices of the Department of Education and primary school Education Boards to a different system of control by boards of trustees, the Special Education Service and the Ministry of Education has had severe implications for special education. A great variety of local arrangements which were often short-term had to be identified and rationalised.

The former system had adapted to a number of new directions:

the inclusion of some learners previously excluded from education;

the movement of learners from segregated special schools onto regular school sites and into regular classes;

the responses to learners on the basis of their individual needs, rather than their membership of labelled disability groups;

the greater involvement of parents, teachers and local communities in making decisions about the education of learners with special educational needs.

These policy directions had developed over the last decade and most of them were formalised in the Education Act 1989.

The task force took account of these directions in shaping their recommendations which are listed, with a brief comment, giving the Ministry of Education's understanding of each recommendation.

▶ *Interim Funding Arrangements*

1. That the current interim funding system for special education should be continued until 1 February 1991.

Schools have set their current budgets and need as much continuity as possible. The Minister has approved this recommendation.

2. That at least the current level of operational funding for special education should be continued.

Because any move of distribute pupils over a number of schools and classes means that economies of scale are lost, it is clear that the need for funding will remain at least at the current level.

3. That an additional $5.1 million per annum be provided under Vote: Education for additional discretionary teacher aid hours, to provide an additional resource particularly for children with low incidence disabilities who are enrolled in regular schools and are being integrated into ordinary classes.

The common conclusion from the submissions and the task force members was that extra teacher aide time was the most important support need identified. The Minister announced the granting of that sum at the same time as he released the task force report.

4. That any additional resource in 1990 be distributed on the basis of the degree of mainstreaming, and that the total distribution basis be reviewed for 1991.

This recommendation affects the distribution of the teacher aide hours. The task force considered that, for the reasons identified in 2 above, those districts with a greater number of individuals in regular classes were likely to require a greater share of the total.

5. That for the period 1 July 1990 to 31 January 1991, the operating grants for satellite classes on the rolls of base special schools should be paid to the boards of trustees of the base schools, and not to the boards of trustees of the host schools in which the classes are accommodated. Boards of trustees of base and host schools should confer with one another to arrive at mutually acceptable budgetary decisions in respect of the operation of satellite classes.

Day special schools often have classes located in regular schools, but which are still substantially part of the special school. There has been considerable debate about whether the classes should be funded through the special school or the host school. The Minister has suggested that further study is necessary before a decision is made on this recommendation.

6. That the funds allocated for the purchase of equipment be distributed to district offices of the Ministry immediately to meet the current applications for equipment purchase.

This funding is for individuals with needs for particular equipment to allow them access to the content of the curriculum.

▶ *Future Directions*

7. That special education operational funding for regular schools and day special schools be regarded as supplementary funding, (distinct from age-related and school-related operational grants) and be determined on the basis of individual needs.

If this recommendation is followed, all funding for special facilities, whether schools, units or classes, should be divided into the part which is related purely to administration and housekeeping, and that part which is available for programmes. This second part should then be used to meet the individual needs of pupils as outlined in their individual education plans. This would mean that if those pupils moved to regular classes, that part of the resource would move with them. Parents' choice of placement for their children would thus not be as dependent on securing new resources.

8. That regardless of ability or disability, all learners of a school's roll should be included when calculating age-appropriate per pupil grants, including operational grants, Maori language grants and special needs grants.

At present, some students are not counted as individuals, but as a class, and are excluded from consideration when determining other special grants. This should change so that every student has basic funding on equal terms, and all other funding is supplementary and tied to an individual's education plan.

9. That discretionary funding is held in such way that it can be applied to meet the specific needs of an individual.

At present, discretionary resources such as part-time teacher and teacher aide hours and equipment funding are separate. If all these resources could be used flexibly, it would be possible for example to convert teacher aide hours into other types of ancillary staff, for instance braillers, who convert print to Braille for students with visual disabilities.

10. That some discretionary resources be retained for allocation to support the transition of individuals from one setting to another.

When students move from one school or class to another, or relocate from special to regular education classrooms, they often need extra assistance for a short period while they settle. The task force suggests that allocation committees keep some teacher aide hours for this purpose.

11. That local advisory committees representing the user groups be established to assist in decisions on resource allocation.

An important principle for both regular and special education is the involvement of the local community in decisions on how the available resources will be divided.

12. That district allocations of discretionary resources to schools not be necessarily on a term by term basis once the allocating agents have a long-term budget, but be allocated for periods up to one year depending on the situation of the learner.

Schools and parents pointed out to the group that where a learner has a longstanding need, for example for physical assistance, the requirement to reapply each term to meet that need is unnecessary.

13. That additional discretionary operating funding and equipment funding be provided for mainstreaming support.

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A need for a small additional sum to provide materials and equipment for learners with special education needs in regular classes was identified.

14. That the Ministry of Education in conjunction with the Special Education Service and major organisations representing school interests devise and implement a method of making operational funding available to learners with special needs in regular classes.

This relates to Recommendation 13.

15. That ongoing work should take place on a within-school model to cater for the high incidence group and a resource centre model for those with low incidence disabilities.

The task force considered the long term structure of special education provisions and outlined a possible two part structure. Those students with physical, hearing, visual or intellectual disabilities could be taught on regular school sites in units or in regular classes. Any specialist teaching that they needed, and support for their teachers, could come from a group of senior staff attached to local resource centres. Such a proposal would maintain a career structure for staff who are currently losing promotion opportunities as special schools close.

Other students with educational and social difficulties could be supported within regular classes by their own teachers with the assistance and support of within-school resource teachers. These teachers could be an additional staffing component and receive training and support for their role.

▶ *Property and Capital Works*

16. That all regular school site additions or alterations are aimed at maximum flexibility of use.

When schools are remodelled or added to in order to accommodate a group of students with disabilities, or a single student, the new facilities should be designed for maximum accessibility by regular staff and students. Where possible the facilities should be easily portable to move with a particular pupil who has a continuing need.

17. That money from the sale of any special schools closed in the future, and from the sale of their resources should be retained in the Ministry to provide additional resources for special education.

The task force considered that special education resources should be retained for supporting learners with special educational needs.

18. That as schools in Department of Social Welfare institutions are closed, any educational resources released should be devoted flexibly to meeting the needs of learners with behavioural difficulties or disadvantaged students.

As the Department of Social Welfare has now announced a schedule of closures, retaining only small institutions in each of the four main centres, the position of the schools in those surplus institutions must be resolved. The task force believes that the education resources involved should be used to support that same group of learners.

19. That no permanent new buildings be constructed on segregated sites, pending the outcome of the recommended review of special education in residential institutions.

This relates to Recommendation 21.

▶ *Special and Residential Schools*

20. That any relocation of special education learners to regular schools take place in full consultation with all parties concerned.

Many of the submissions that the task force received from parents emphasised their concern that changes such as closures of special schools would take place arbitrarily. Parents are protected by legislation requiring full consultation before such closures are agreed to. The task force acknowledged that there was likely to continue to be a steady decline in enrolments in segregated schools and classes as more parents chose to enrol their children in regular schools and classes.

21. That there be a comprehensive review of the effectiveness and efficiency of the education provided by hospital classes and schools, classes and units in area health board facilities, health camp schools, and residential special schools.

The task force considers that there should be a review of the way in which residential education is provided for students with special educational needs, to investigate options and establish the level of need.

22. That there be a review of the appropriateness of the present role of the Royal New Zealand Foundation for the Blind in education.

The Royal New Zealand Foundation for the Blind is funded by the Ministry of Education to provide education services for learners with visual disabilities. Currently some learners receive services from this source, while others are served by visual and sensory resource centres attached to schools.

23. That parents be able to choose to stand and vote for the board of trustees of the school in which their

child is accommodated for most of the school week, as an alternative to being eligible to stand and vote for the board of the school in which the child is enrolled.

This relates to the issue in Recommendation 5. One of the reasons for the shape of the recommendation was that currently parents of children who are enrolled in special schools but educated in satellite classes cannot vote for the board of trustees of that host school, and therefore have no say in how resources for their children are used.

▶ *Co-ordination*

24. That discussions between the Ministry of Education and the Departments of Health and Social Welfare be continued in order to resolve the issues of employment and funding noted above before 1 July 1991.

Changes in the responsibilities of the Departments of Health and Social Welfare have some implications for education. In addition the questions of who employs occupational therapists and physiotherapists, and who is eligible to use their services are long overdue for answers.

25. That there be a continuing national overview of the operation of the psychopaedic hospital education policy.

As part of ongoing government policy, a number of school-age residents of psychopaedic hospitals have this year become eligible for education. Decisions about the education of these learners will depend to some extent on decisions about where they will live.

▶ *Miscellaneous*

26. That a national teacher development programme supported by the Ministry be devoted to this purpose for the next five years, and that the appropriate actions are taken to encourage training institutions to prepare all staff for teaching learners with special educational needs.

The changes in special education have meant that both special and regular educators have a training need. Special educators need to learn skills for collaborative work with their colleagues in regular education, and regular staff need to increase their confidence in their skills to teach learners with special educational needs. This has implications for both pre-service and in-service training.

27. That the language used in all official documents is not demeaning, and that a guide to non-demeaning language is widely available.

The titles of special classes and schools, and many of the terms used about learners with special education needs, require revision so that the dignity of the individual is respected.

28. That guidelines on the enrolment of learners with special education needs be provided urgently to schools and parents.

The task force was made aware of instances where the legal position on enrolment of learners with special education needs was not well understood by schools. The ministry is working on a set of guidelines at the moment, which should be available to schools in July.

29. That funds to pay discretionary teacher aides should be retained by the central funding body, and be provided directly to the payroll service.

Such a mechanism would enable a more streamlined payment system that would allow individual aides to be paid appropriate rates, and would reduce the number of transfers of funding compared to the present system.

▶ *Future Action*

The Minister has announced that he has accepted the recommendation for extra discretionary teacher aide funding, and for the continuation of the interim funding system. He also continues to support the requirement for consultation about the proposed closure of special schools.

He has asked the ministry to do further work on the remaining suggestions. Many of them will be considered in the light of the Lough Report, *Today's Schools* which recommends the transfer of special education resources to the Special Education Service for allocation.